

# Portage Metropolitan Housing Authority

5 Year Plan for Fiscal Years 2003 - 2007

Annual Plan for Fiscal Year 2003

**Approved by PMHA Board, October 17, 2002**  
**Approved by HUD,**

**PHA Plan  
Agency Identification**

**PHA Name:** Portage Metropolitan Housing Authority

**PHA Number:** OH031

**PHA Fiscal Year Beginning:** 01/2003

**Public Access to Information**

**Information regarding any activities outlined in this plan can be obtained by contacting: (select all that apply)**

- ☒ Main administrative office of the PHA
- ☐ PHA development management offices
- ☐ PHA local offices

**Display Locations for PHA Plans and Supporting Documents**

The PHA Plans (including attachments) are available for public inspection at: (select all that apply)

- ☒ Main administrative office of the PHA
- ☐ PHA development management offices
- ☐ PHA local offices
- ☐ Main administrative office of the local government
- ☐ Main administrative office of the County government
- ☐ Main administrative office of the State government
- ☐ Public library
- ☐ PHA website
- ☐ Other (list below)

PHA Plan Supporting Documents are available for inspection at: (select all that apply)

- ☒ Main business office of the PHA
- ☐ PHA development management offices
- ☐ Other (list below)



**5-YEAR PLAN**  
**PHA FISCAL YEARS 2003 - 2007**  
[24 CFR Part 903.5]

**A. Mission**

State the PHA's mission for serving the needs of low-income, very low income, and extremely low-income families in the PHA's jurisdiction. (Select one of the choices below)

- ☐ The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- ☒ The PHA's mission is: The Portage Metropolitan Housing Authority is dedicated to meeting the housing needs of low-income families and individuals of Portage County by developing, managing and supporting decent affordable housing in partnership with community agencies.

**B. Goals**

*The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHAs may select any of these goals and objectives as their own, or identify other goals and/or objectives. Whether selecting the HUD-suggested objectives or their own, **PHAS ARE STRONGLY ENCOURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS.** (Quantifiable measures would include targets such as: numbers of families served or PHAS scores achieved.) PHAs should identify these measures in the spaces to the right of or below the stated objectives.*

***Portage MHA's Agency Goals and 5 Year Objectives are following the HUD goals.***

**HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing.**

- ☐ PHA Goal: Expand the supply of assisted housing  
Objectives:
- ☐ Apply for additional rental vouchers:
  - ☐ Reduce public housing vacancies:
  - ☐ Leverage private or other public funds to create additional housing opportunities:
  - ☐ Acquire or build units or developments
  - ☐ Other (list below) (See consolidated list of PMHA Goals and 5 Year Objectives at end of this section)
- ☐ PHA Goal: Improve the quality of assisted housing  
Objectives:
- ☐ Improve public housing management: (PHAS score)
  - ☐ Improve voucher management: (SEMAP score)
  - ☐ Increase customer satisfaction:

- ☐ Concentrate on efforts to improve specific management functions:  
(list; e.g., public housing finance; voucher unit inspections)
  - ☐ Renovate or modernize public housing units:
  - ☐ Demolish or dispose of obsolete public housing:
  - ☐ Provide replacement public housing:
  - ☐ Provide replacement vouchers:
  - ☐ Other: (list below) (See consolidated list of PMHA Goals and 5 Year Objectives at end of this section)
- ☐ PHA Goal: Increase assisted housing choices
- Objectives:
- ☐ Provide voucher mobility counseling:
  - ☐ Conduct outreach efforts to potential voucher landlords
  - ☐ Increase voucher payment standards
  - ☐ Implement voucher homeownership program:
  - ☐ Implement public housing or other homeownership programs:
  - ☐ Implement public housing site-based waiting lists:
  - ☐ Convert public housing to vouchers:
  - ☐ Other: (list below) (See consolidated list of PMHA Goals and 5 Year Objectives at end of this section)

### **HUD Strategic Goal: Improve community quality of life and economic vitality**

- ☐ PHA Goal: Provide an improved living environment
- Objectives:
- ☐ Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:
  - ☐ Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
  - ☐ Implement public housing security improvements:
  - ☐ Designate developments or buildings for particular resident groups (elderly, persons with disabilities)
  - ☐ Other: (list below) (See consolidated list of PMHA Goals and 5 Year Objectives at end of this section)

**HUD Strategic Goal: Promote self-sufficiency and asset development of families and individuals**

- ☐ PHA Goal: Promote self-sufficiency and asset development of assisted households
- Objectives:
- ☐ Increase the number and percentage of employed persons in assisted families:
  - ☐ Provide or attract supportive services to improve assistance recipients' employability:
  - ☐ Provide or attract supportive services to increase independence for the elderly or families with disabilities.
  - ☐ Other: (list below) (See consolidated list of PMHA Goals and 5 Year Objectives at end of this section)

**HUD Strategic Goal: Ensure Equal Opportunity in Housing for all Americans**

- ☐ PHA Goal: Ensure equal opportunity and affirmatively further fair housing
- Objectives:
- ☐ Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability:
  - ☐ Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability:
  - ☐ Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
  - ☐ Other: (list below)

**Other PHA Goals and Objectives: (list below)**

**PMHA AGENCY GOALS**

1. Efficiently, effectively operate agency-housing programs, while being sensitive to the needs and concerns of participants, landlords, and the community.

2. Respond to local housing needs by developing new affordable housing opportunities for low-income households and improving resource utilization.
3. Enhance the quality of life of the PMHA's residents, with particular emphasis upon promotion of family self-sufficiency.

## **5 YEAR OBJECTIVES**

1. Efficiently, effectively operate agency housing programs, while being sensitive to the needs and concerns of participants, landlords, and the community.
  - A. Ensure efficient, effective, responsive Section 8 administration
    1. Achieve and maintain SEMAP High Performer status
    2. Maximize the effectiveness of the program for applicants and participants
    3. Maximize the efficiency of the program
    4. Recruit new landlords
  - B. Ensure efficient, effective, responsive public housing administration
    1. Maintain PHAS High Performer status
    2. Maximize the efficiency and effectiveness of housing management
    3. Maximize the efficiency of maintenance
2. Respond to local housing needs by developing new affordable housing opportunities for low-income households and improving resource utilization.
  - A. Develop affordable housing using HUD and non-HUD sources
    1. Expand the supply of permanent, affordable housing, for the low-to moderate-income population in a variety of geographic areas.
    2. Preserve the inventory of privately owned permanent, affordable rental housing for the general low-income population.
    3. Develop affordable housing with supportive services for special needs populations.
  - B. Use Public Housing and Section 8 resources to meet local identified housing needs
    1. Maximize Section 8 lease-up rate.
    2. Monitor Tenant Preference Policy to meet identified housing needs.
    3. Identify alternative uses for developments having marketing issues.
3. Enhance the quality of life of the PMHA's residents, with particular emphasis upon promotion of family self-sufficiency.
  - A. Increase self-sufficiency rate in public housing.
    1. Ensure policies encourage and support family responsibility.
    2. Encourage on-site supportive services.
    3. Use housing as an incentive for self-sufficiency progress.
    4. Seek out and pursue appropriate grant opportunities.
  - B. Increase employment rate of Section 8 and public housing families.
    1. Provide incentives for tenants to generate higher income.
    2. Provide job training and work through PMHA maintenance/construction needs.

*Annual strategies are located in “Statement of Housing Needs,” part C, “Strategy for Addressing Needs”*



**Annual PHA Plan**  
**PHA Fiscal Year 2003**  
[24 CFR Part 903.7]

**i. Annual Plan Type:**

Select which type of Annual Plan the PHA will submit.

☐ **Standard Plan**

**Streamlined Plan:**

- ☒ **High Performing PHA**  
☐ **Small Agency (<250 Public Housing Units)**  
☐ **Administering Section 8 Only**

**Note, although PMHA has prepared a Streamlined Plan, information regarding sections omitted from this Plan, including maintenance procedures, housing management procedures, grievance procedures, and resident programs, is on display in PMHA's central repository and available for public inspection.**

☐ **Troubled Agency Plan**

**ii. Executive Summary of the Annual PHA Plan**

[24 CFR Part 903.7 9 (r)]

Provide a brief overview of the information in the Annual Plan, including highlights of major initiatives and discretionary policies the PHA has included in the Annual Plan.

The Portage Metropolitan Housing Authority (PMHA) Annual Plan format is guided by two designations awarded to PMHA. The Annual Plan follows the streamlined version due to the PMHA's HUD designation as a High Performer. The Plan is also modified by PMHA's acceptance under HUD's demonstration program known as Moving to Work (MTW). The PMHA is one of 24 national demonstration sites for a new program known locally as Portage HOPES (Housing Opportunities Promoting Economic Self-Sufficiency). This designation provides PMHA the opportunity to evaluate and modify HUD regulations, flexibility to design programs to meet local needs and conditions, and the opportunity to combine funds from different programs.

Portage HOPES is characterized by modified program regulations, particularly those related to rent calculations, in order to promote employment by housing participants. In addition, PMHA's housing inventory will be used as a reward for participants making economic progress. Supportive services and homeownership opportunities will further complement efforts to assist residents to become self-sufficient.

Most of the activities undertaken in year 2003 will involve continuation of Portage HOPES. Year 2003 objectives involve three areas. First, activities will continue to focus on improving efficiency of operations for both Section 8 and public housing. Second, housing resources will continue to be redirected to better meet local housing needs. Finally, program procedures and policies will be analyzed and modified as necessary in order to encourage participants to obtain and retain employment.

The two changes to the PMHA's MTW program in 2003 include a minor modification to the MTW Rent Policy and a change in the use of a scattered site duplex. The MTW Rent Policy change involves improving the efficiency of rent collections and is described in Attachment H. The property at 213 S. Willow, Kent is proposed for use as short-term transitional housing. The procedures governing this use are cited in Attachment I. The PMHA Board has approved the MTW Rent Policy change for implementation. HUD must approve the use of Willow for short-term transitional housing as part of this Annual Plan review prior to implementation.

### **iii. Annual Plan Table of Contents\**

[24 CFR Part 903.7 9 (r)]

Provide a table of contents for the Annual Plan, including attachments, and a list of supporting documents available for public inspection.

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#### Attachments

Indicate which attachments are provided by selecting all that apply. Provide the attachment's name (A, B, etc.) in the space to the left of the name of the attachment. Note: If the attachment is provided as a **SEPARATE** file submission from the PHA Plans file, provide the file name in parentheses in the space to the right of the title.

#### Required Attachments:

- ☒ Admissions Policy for Deconcentration
- ☒ FY 2003 Capital Fund Program Annual Statement
- ☐ Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)
- ☒ Progress in Meeting 5-Year Plan Mission and Goals
- ☒ Resident Membership of the PHA Governing Board
- ☒ Membership of the Resident Advisory Board
- ☒ Voluntary Conversion Initial Assessment

#### Optional Attachments:

- ☐ PHA Management Organizational Chart
- ☒ FY 2003 Capital Fund Program 5 Year Action Plan
- ☐ Public Housing Drug Elimination Program (PHDEP) Plan
- ☒ Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- ☐ Other:

#### List of Attachments

- Attachment A, Deconcentration Policy**
- Attachment B, 2003 Capital Fund Annual Statement & Five-Year Capital Fund Plan**
- Attachment C, Progress in Meeting 5 Year Plan Mission and Goals**
- Attachment D, Resident Advisory Board Comments**
- Attachment E, Membership of the Resident Advisory Board**
- Attachment F, Resident Membership of the PHA Governing Board**
- Attachment G, RASS Follow-up Plan**
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- Attachment K, Capital Fund P&E OH12P031501-00 (6/30/02)**
- Attachment L, Capital Fund P&E OH12P031501-01 (6/30/02)**
- Attachment M, Capital Fund P&E OH12P031501-02 (6/30/02)**
- Attachment N, MTW Rent Policy Change**
- Attachment O, 707-Final P&E Ending 09/30/2002**

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\* N/A, Not applicable due to High Performer Status.

### Supporting Documents Available for Review

Indicate which documents are available for public review by placing a mark in the “Applicable & On Display” column in the appropriate rows. All listed documents must be on display if applicable to the program activities conducted by the PHA.

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement.	5 Year and Annual Plans
X	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the methodology for setting public housing flat rents <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
NA Per Moving to Work contract	Schedule of flat rents offered at each public housing development <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents,	Annual Plan: Operations and

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Maintenance
X	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	Voluntary Conversion Initial Assessments	Annual Plan: Voluntary Conversion Initial Assessments
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
NA	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
Attachment to Plan	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
NA	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
NA	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
NA	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
NA	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
NA	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
NA	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
X	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan for Section 8	Annual Plan: Community Service & Self-Sufficiency
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
X	The most recent Public Housing Drug Elimination Program (PHDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U. S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
NA	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)
X	Moving To Work Plan	MTW Implementation Plan
X	Pet Policy for Seniors and Pet Policy for Families	Supporting Documents Binder
X	Maintenance Procedures and Tenant Charges	Annual Plan: Operations/ Mangmt

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	PMHA Descriptive Information	Supporting Documents Binder
X	Resident Program Descriptions and Partnership Agreements	Annual Plan: Self-Sufficiency
X	Resident Satisfaction Survey Follow-up Plan	Supporting Documents Binder
X	2001 Public Housing Assessment System Report	Supporting Documents Binder

## 1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

### A. Housing Needs of Families in the Jurisdiction/s Served by the PHA

Based upon the information contained in the Consolidated Plan/s applicable to the jurisdiction, and/or other data available to the PHA, provide a statement of the housing needs in the jurisdiction by completing the following table. In the "Overall" Needs column, provide the estimated number of renter families that have housing needs. For the remaining characteristics, rate the impact of that factor on the housing needs for each family type, from 1 to 5, with 1 being "no impact" and 5 being "severe impact." Use N/A to indicate that no information is available upon which the PHA can make this assessment.

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford- ability	Supply	Quality	Access- ibility	Size	Loca- tion
Income <= 30% of AMI	3772	5	5	5	2	3	3
Income >30% but <=50% of AMI	2758	4	5	5	2	3	3
Income >50% but <80% of AMI	3381	2	3	4	2	3	3
Elderly	1539	4	3	3	2	1	3
Families with Disabilities	920	26	16	10	4	2	3
Black non-Hispanic	670	19	11	8	0	2	3
Hispanic	87	3	2	1	0	1	0
Race/Ethnicity	N/A	N/A	N/A	N/A	N/A	N/A	N/A

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- ☒ Consolidated Plan of the City of Kent, Ohio  
Indicate year: 1995-2000
- ☒ U.S. Census data: the Comprehensive Housing Affordability Strategy ("CHAS") dataset State of Ohio
- ☐ American Housing Survey data  
Indicate year:
- ☐ Other housing market study  
Indicate year:
- ☒ Other sources: Portage County Comprehensive Housing Strategies, CHAS Table 1C for Portage County and Portage County Regional Planning Commission interpolation of 1990 Census data

**B. Housing Needs of Families on the Public Housing and Section 8 Tenant- Based Assistance Waiting Lists**

State the housing needs of the families on the PHA's waiting list/s. **Complete one table for each type of PHA-wide waiting list administered by the PHA.** PHAs may provide separate tables for site-based or sub-jurisdictional public housing waiting lists at their option.

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover # notified 7/01-6/02
Waiting list total	1,590		932
Extremely low income <=30% AMI	1445	90.9%	
Very low income (>30% but <=50% AMI)	142	8.9%	
Low income (>50% but <80% AMI)	3	0.2%	
Families with children	1,417	89.1%	
Elderly families	71	4.5%	
Families with Disabilities	138	8.7%	
White	1,091	68.6%	
African American	439	27.6%	
Hispanic	13	0.8%	
Other	47	3.0%	
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed?			
<input type="checkbox"/> No <input type="checkbox"/> Yes			



Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance <input checked="" type="checkbox"/> Public Housing <input type="checkbox"/> Combined Section 8 and Public Housing <input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional) If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover # notified 7/01-6/02
Waiting list total	1,015		1,520
Extremely low income <=30% AMI	917	90.3%	
Very low income (>30% but <=50% AMI)	95	9.4%	
Low income (>50% but <80% AMI)	3	0.3%	
Families with children	814	80.2%	
Elderly families	57	5.6%	
Families with Disabilities	214	21.1%	
White	741	73.0%	
African American	225	22.1%	
Hispanic	14	1.4%	
Other	35	3.5%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	201	19.8%	86
2 BR	501	49.4%	916
3 BR	275	27.1%	426
4 BR	36	3.5%	92
5 BR	1	0.1	NA
5+ BR	1	0.1	NA
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes If yes: How long has it been closed (# of months)? Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

### C. Strategy for Addressing Needs

Provide a brief description of the PHA's strategy for addressing the housing needs of families in the jurisdiction and on the waiting list **IN THE UPCOMING YEAR**, and the Agency's reasons for choosing this strategy.

#### YEAR 2003 STRATAGIES

1. Efficiently, effectively operate agency housing programs, while being sensitive to the needs and concerns of participants, landlords, and the community.
  - A. Ensure efficient, effective, responsive Section 8 administration
    1. Achieve SEMAP High Performer status
      - a. Continue to conduct semi-annual internal reviews
      - b. Complete conversion of files to MTW 50058
      - c. Provide on-going training to staff on use of Visual MCS system
    2. Maximize the effectiveness of the program for applicants and participants
      - a. Continue to expand homeownership program
      - b. Conduct written surveys of program participants to obtain feedback on policies and their effectiveness
    3. Maximize the efficiency of the program
      - a. Improve efficiency in the briefing process (e.g., briefings held at regularly scheduled intervals, smaller groups, etc.)
        - b. Target zero income participants for integrity checks and referrals
    4. Recruit new landlords
      - a. Conduct periodic seminars for potential and current landlords
      - b. Conduct written surveys of property owners to obtain feedback
  - B. Ensure efficient, effective, responsive public housing administration
    1. Maintain PHAS High Performer status
      - a. Continue to conduct quarterly site inspections of multi-family developments and address PHAS and preventative maintenance needs as soon as identified
    2. Maximize the efficiency and effectiveness of housing management
      - a. Notify sole remaining family members more timely after they qualify as a sole family member (after 90 days of family composition change)
      - b. Revisit current calculation Policy to determine if a new policy is needed
      - c. Revise existing Housekeeping Policy to assist in more effective inspections and lease enforcement and clearly relay the procedures to residents prior to implementation.
      - d. Create a vehicle registration system and database for 1 to 2 properties on a test basis to assist in determining realistic procedures and ongoing maintenance of the system.
      - e. Further develop towing procedures for quicker follow-up instead of implementing only during business hours.
      - f. Further develop applicant screening procedures
      - g. Further improve lease enforcement.
      - h. Further improve maintenance communications in regard to lease enforcement and vacancies
      - i. Further improve rent collection procedures

3. Maximize the efficiency of maintenance
  - a. Maintain PHAS physical inspection score of at least 90%
  - b. Maintain vacancy turn around time to average 10 days.
  - c. Implement a preventative maintenance program for equipment.
  - d. Reorganize Maintenance Department to become more efficient and productive.
  - e. Research alternatives to current after-hours system.
2. Respond to local housing needs by developing new affordable housing opportunities for low-income households and improving resource utilization.
  - A. Develop affordable housing using HUD and non-HUD sources
    1. Expand the supply of permanent, affordable housing, for the low-to-moderate income population in a variety of geographic areas.
      - a. Analyze opportunities for acquisition or new construction that come to the attention of PMHA
      - b. Keep up-to-date on new tools for financing housing
      - c. Analyze best use of vacant single-family lots owned by PMHA
    2. Preserve the inventory of permanent, affordable rental housing for the general low-income population
      - a. Monitor HUD contracts with private owners that are expiring, and keep in contact with owners about future plans
      - b. Administer new Section 8 vouchers received to support private project-based subsidized properties having pre-paid HUD mortgages
      - c. Assist current or new owners attempting to preserve existing affordable housing with PMHA services or resources
    3. Support the development of affordable housing with supportive services for special needs populations.
      - a. Continue meetings of Mainstream committee, and apply for Mainstream Section 8 units if needed
  - B. Use Public Housing and Section 8 resources to meet identified housing needs
 

Monitor Tenant Preference Policy to meet identified housing needs

    - a. Work with local social service agencies to refine tenant selection preferences to meet local needs as well as maximizing utilization
    2. Identify alternative uses for developments having marketing issues
      - a. Form task force to study best occupancy use for Etna House.
      - a. Submit proposal to HUD for conversion of Willow property to transitional housing.
    3. Use Section 8 resources to assist housing owned by non-profits
      - a. Promote Section 8 project-based program for non-profit owners serving special needs clients
3. Enhance the quality of life of the PMHA's residents, with particular emphasis upon promotion of family self-sufficiency.
  - A. Increase self-sufficiency rate in public housing
    1. Ensure policies encourage family responsibility
      - a. Implement Portage HOPES changes to rent policy
    2. Encourage on-site supportive services

- a. Continue to support non-profit partners providing supportive services to public housing residents
- 3. Use housing as an incentive for self-sufficiency progress
  - a. Implement STEP Section 8 features of Portage HOPES
  - b. Coordinate with Portage Area Development Corp. to expand the Section 8 homeownership program
- 4. Seek out and pursue appropriate grant opportunities
  - a. Seek funding for self-sufficiency activities for PMHA participants
  - b. Seek new partnerships with local agencies agreeing to offer services to PMHA participants
  - c. Seek designation of the Community Estates neighborhood as a neighborhood eligible for Weed and Seed funding
- B. Increase employment rate of Section 8 and public housing families.
  - 1. Provide incentives for tenants to generate higher income
    - a. Monitor impact of rents in public housing
    - b. Continue working with social service agencies to target services to PMHA participants having zero incomes
  - 2. Provide job training and work through PMHA maintenance/construction needs
    - a. Continue the maintenance/construction job training program by implementing the final year of the ROSS (Resident Opportunities for Self- Sufficiency) grant
    - b. Work with graduates of PMHA job training program to support them in becoming bidders on work offered by PMHA
    - c. Establish a maintenance training facility at Heritage Knolls

*(1) Strategies*

**Need: Shortage of affordable housing for all eligible populations**

**Strategy 1. Maximize the number of affordable units available to the PHA within its current resources by:**

Select all that apply

- ☒ Employ effective maintenance and management policies to minimize the number of public housing units off-line
- ☒ Reduce turnover time for vacated public housing units
- ☐ Reduce time to renovate public housing units
- ☐ Seek replacement of public housing units lost to the inventory through mixed finance development
- ☐ Seek replacement of public housing units lost to the inventory through section 8 replacement housing resources
- ☒ Maintain or increase section 8 lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction
- ☒ Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
- ☒ Maintain or increase section 8 lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration
- ☒ Maintain or increase section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of program
- ☒ Participate in the Consolidated Plan development process to ensure coordination with broader community strategies
- ☐ Other (list below)

**Strategy 2: Increase the number of affordable housing units by:**

Select all that apply

- ☒ Apply for additional section 8 units should they become available
- ☒ Leverage affordable housing resources in the community through the creation of mixed-finance housing
- ☒ Pursue housing resources other than public housing or Section 8 tenant-based assistance.
- ☐ Other: (list below)

**Need: Specific Family Types: Families at or below 30% of median****Strategy 1: Target available assistance to families at or below 30 % of AMI**

Select all that apply

- ☒ Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing (**by meeting MTW goals**)
- ☐ Exceed HUD federal targeting requirements for families at or below 30% of AMI in tenant-based section 8 assistance
- ☐ Employ admissions preferences aimed at families with economic hardships
- ☒ Adopt rent policies to support and encourage work
- ☐ Other: (list below)

**Need: Specific Family Types: Families at or below 50% of median****Strategy 1: Target available assistance to families at or below 50% of AMI**

Select all that apply

- ☒ Employ admissions preferences aimed at families who are working
- ☒ Adopt rent policies to support and encourage work
- ☐ Other: (list below)

**Need: Specific Family Types: The Elderly****Strategy 1: Target available assistance to the elderly:**

Select all that apply

- ☐ Seek designation of public housing for the elderly
- ☐ Apply for special-purpose vouchers targeted to the elderly, should they become available
- ☒ Other:
  - ~~///~~ Conduct outreach to expand elderly waiting list
  - ~~///~~ Analysis of community need for specially designated elderly and disabled housing

**Need: Specific Family Types: Families with Disabilities**

**Strategy 1: Target available assistance to Families with Disabilities:**

Select all that apply

- ☐ Seek designation of public housing for families with disabilities
- ☐ Carry out the modifications needed in public housing based on the section 504 Needs Assessment for Public Housing
- ☒ Apply for special-purpose vouchers targeted to families with disabilities, should they become available
- ☒ Affirmatively market to local non-profit agencies that assist families with disabilities
- ☒ Other: As part of the Moving to Work program, PMHA will establish Section 8 project-based program for non-profit service providers for the disabled

**Need: Specific Family Types: Races or ethnicities with disproportionate housing needs****Strategy 1: Increase awareness of PHA resources among families of races and ethnicities with disproportionate needs:**

Select if applicable

- ☐ Affirmatively market to races/ethnicities shown to have disproportionate housing needs
- ☐ Other: (list below)

**Strategy 2: Conduct activities to affirmatively further fair housing**

Select all that apply

- ☒ Inform section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units
- ☒ Market the section 8 program to owners outside of areas of poverty /minority concentrations
- ☒ Other: **Expand use of Section 8 Exception Rents to increase housing choice**

**Other Housing Needs & Strategies: (list needs and strategies below)****(2) Reasons for Selecting Strategies**

Of the factors listed below, select all that influenced the PHA's selection of the strategies it will pursue:

- ☒ Funding constraints
- ☒ Staffing constraints
- ☒ Limited availability of sites for assisted housing
- ☒ Extent to which particular housing needs are met by other organizations in the community
- ☒ Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA
- ☒ Influence of the housing market on PHA programs
- ☒ Community priorities regarding housing assistance
- ☒ Results of consultation with local or state government
- ☒ Results of consultation with residents and the Resident Advisory Board
- ☒ Results of consultation with advocacy groups
- ☐ Other: (list below)

## **2. Statement of Financial Resources**

[24 CFR Part 903.7 9 (b)]

List the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant-based Section 8 assistance programs administered by the PHA during the Plan year. Note: the table assumes that Federal public housing or tenant based Section 8 assistance grant funds are expended on eligible purposes; therefore, uses of these funds need not be stated. For other funds, indicate the use for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2000 grants)</b>		
a) Public Housing Operating Fund	\$ 619,419	
b) Public Housing Capital Fund	568,404	
c) HOPE VI Revitalization	0	
d) HOPE VI Demolition	0	
e) Annual Contributions for Section 8 Tenant-Based Assistance	5,818,136	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	48,522	
g) Resident Opportunity and Self-Sufficiency Grants	51,985	
h) Community Development Block Grant	0	
i) HOME	0	
Other Federal Grants (list below)		
Section 8 Mod Rehab	1,359,084	Rental assistance
Section 8 FSS Coordinator	35,520	Supportive service referral
MTW Technical Assistance	36,000	Technical assistance
Section 8 New Construction	590,136	Contract Administrator
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
Comprehensive Grants: 501-01	230,674	PH capital improvements
501-02	356,129	PH capital improvements
<b>3. Public Housing Dwelling Rental Income</b>	597,000	PH operations
Public Housing Excess Utilities	9,000	PH operations
<b>4. Other income (list below)</b>		
Laundry Rental Income	4,000	PH operations
Investment Income	88,300	PH& Section 8 operations
<b>4. Non-federal sources (list below)</b>		
Commercial rental income	20,000	Supports learning center

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
Total resources	\$10,432,309	

### **3. PHA Policies Governing Eligibility, Selection, and Admissions**

[24 CFR Part 903.7 9 (c)]

#### **A. Public Housing**

Exemptions: PHAs that do not administer public housing are not required to complete subcomponent 3A.

#### **(1) Eligibility**

- a. When does the PHA verify eligibility for admission to public housing? (select all that apply)
- ☒ When families are within a certain number of being offered a unit (20-30 households)
- ☒ When families are within a certain time of being offered a unit: (30-60 days)
- ☐ Other: (describe)
- b. Which non-income (screening) factors does the PHA use to establish eligibility for admission to public housing (select all that apply)?
- ☒ Criminal or Drug-related activity
- ☒ Rental history (landlord references; court records)
- ☒ Housekeeping
- ☒ Other (credit check)
- c. ☒ Yes ☐ No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- d. ☐ Yes ☒ No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- e. ☐ Yes ☒ No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

#### **(2)Waiting List Organization**

- a. Which methods does the PHA plan to use to organize its public housing waiting list (select all that apply)
- ☒ Community-wide list
- ☐ Sub-jurisdictional lists
- ☐ Site-based waiting lists
- ☐ Other (describe)
- b. Where may interested persons apply for admission to public housing?
- ☒ PHA main administrative office
- ☐ PHA development site management office
- ☐ Other (list below)
- c. If the PHA plans to operate one or more site-based waiting lists in the coming year, answer each of the following questions; if not, skip to subsection (3) **Assignment**



1. How many site-based waiting lists will the PHA operate in the coming year? **None**
2. ☐ Yes ☐ No: Are any or all of the PHA's site-based waiting lists new for the upcoming year (that is, they are not part of a previously HUD-approved site based waiting list plan)?  
If yes, how many lists?
3. ☐ Yes ☐ No: May families be on more than one list simultaneously  
If yes, how many lists?
4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?
  - ☐ PHA main administrative office
  - ☐ All PHA development management offices
  - ☐ Management offices at developments with site-based waiting lists
  - ☐ At the development to which they would like to apply
  - ☐ Other (list below)

### **(3) Assignment**

- a. How many vacant unit choices are applicants ordinarily given before they fall to the bottom of or are removed from the waiting list? (select one)
  - ☐ One
  - ☐ Two
  - ☒ Three or More
- b. ☒ Yes ☐ No: Is this policy consistent across all waiting list types?
- c. If answer to b is no, list variations for any other than the primary public housing waiting list/s for the PHA:

### **(4) Admissions Preferences**

- a. Income targeting:
  - ☒ Yes ☐ No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income?
- b. Transfer policies:
  - In what circumstances will transfers take precedence over new admissions? (list below)
  - ☒ Emergencies
  - ☒ Overhoused
  - ☒ Underhoused
  - ☒ Medical justification
  - ☒ Administrative reasons determined by the PHA (e.g., to permit modernization work)
  - ☒ Resident choice: **relocate to be closer to work, school and/or day care**
  - ☐ Other: (list below)
- c. Preferences

1. ☒ Yes ☐ No: Has the PHA established preferences for admission to public housing (other than date and time of application)? (If “no” is selected, skip to subsection **(5) Occupancy**)
2. Which of the following admission preferences does the PHA plan to employ in the coming year?  
(select all that apply from either former Federal preferences or other preferences)

Former Federal preferences:

- ☒ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- ☐ Victims of domestic violence
- ☐ Substandard housing
- ☒ Homelessness
- ☐ High rent burden (rent is > 50 percent of income)

Other preferences: (select below)

- ☒ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans' families
- ☒ Residents who live and/or work in the jurisdiction
- ☒ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☐ Other preference(s) (list below)

3. If the PHA will employ admissions preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.

1 Date and Time

Former Federal preferences:

- 1 Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- 1 Victims of domestic violence
- 1 Substandard housing
- 1 Homelessness
- 1 High rent burden

Other preferences (select all that apply)

- ☒ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans' families
- ☒ Residents who live and/or work in the jurisdiction
- ☒ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☐ Other preference(s) (list below)

4. Relationship of preferences to income targeting requirements:

- ☐ The PHA applies preferences within income tiers
- ☒ Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements

**(5) Occupancy**

a. What reference materials can applicants and residents use to obtain information about the rules of occupancy of public housing (select all that apply)

- ☒ The PHA-resident lease
- ☒ The PHA's Admissions and (Continued) Occupancy policy
- ☒ PHA briefing seminars or written materials
- ☐ Other source (list)

b. How often must residents notify the PHA of changes in family composition? (select all that apply)

- ☐ At an annual reexamination and lease renewal
- ☒ Any time family composition changes
- ☐ At family request for revision
- ☐ Other (list)

**(6) Deconcentration and Income Mixing**

a. ☐ Yes ☒ No: Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the need for measures to promote deconcentration of poverty or income mixing?

b. ☐ Yes ☒ No: Did the PHA adopt any changes to its **admissions policies** based on the results of the required analysis of the need to promote deconcentration of poverty or to assure income mixing?

c. If the answer to b was yes, what changes were adopted? (select all that apply)

- ☐ Adoption of site-based waiting lists  
If selected, list targeted developments below:
- ☐ Employing waiting list "skipping" to achieve deconcentration of poverty or income mixing goals at targeted developments  
If selected, list targeted developments below:
- ☐ Employing new admission preferences at targeted developments  
If selected, list targeted developments below:
- ☐ Other (list policies and developments targeted below)

d. ☐ Yes ☐ No: Did the PHA adopt any changes to **other** policies based on the results of the required analysis of the need for deconcentration of poverty and income mixing?

e. If the answer to d was yes, how would you describe these changes? (select all that apply)

- ☐ Additional affirmative marketing
- ☐ Actions to improve the marketability of certain developments
- ☐ Adoption or adjustment of ceiling rents for certain developments
- ☐ Adoption of rent incentives to encourage deconcentration of poverty and income-mixing
- ☐ Other (list below)

f. Based on the results of the required analysis, in which developments will the PHA make special efforts to attract or retain higher-income families? (select all that apply)

- ☒ Not applicable: results of analysis did not indicate a need for such efforts

☐ List (any applicable) developments below:

g. Based on the results of the required analysis, in which developments will the PHA make special efforts to assure access for lower-income families? (select all that apply)

☒ Not applicable: results of analysis did not indicate a need for such efforts

☐ List (any applicable) developments below:

## B. Section 8

Exemptions: PHAs that do not administer section 8 are not required to complete sub-component 3B.

**Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

### (1) Eligibility

a. What is the extent of screening conducted by the PHA? (select all that apply)

☒ Criminal or drug-related activity only to the extent required by law or regulation

☐ Criminal and drug-related activity, more extensively than required by law or regulation

☐ More general screening than criminal and drug-related activity (list factors below)

☐ Other (list below)

b. ☒ Yes ☐ No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

c. ☒ Yes ☐ No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

d. ☐ Yes ☒ No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

e. Indicate what kinds of information you share with prospective landlords? (select all that apply)

☐ Criminal or drug-related activity

☒ Other (no information is shared)

### (2) Waiting List Organization

a. With which of the following program waiting lists is the section 8 tenant-based assistance waiting list merged? (select all that apply)

☐ None

☐ Federal public housing

☒ Federal moderate rehabilitation

☐ Federal project-based certificate program

☐ Other federal or local program (list below)

b. Where may interested persons apply for admission to section 8 tenant-based assistance? (select all that apply)

☒ PHA main administrative office

☐ Other (list below)

### (3) Search Time

- a. ☒ Yes ☐ No: Does the PHA give extensions on standard 60-day period to search for a unit?

If yes, state circumstances below: **Applicant must show proof of an active search in the form of a completed landlord contact sheet**

### (4) Admissions Preferences

a. Income targeting

- ☒ Yes ☐ No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the section 8 program to families at or below 30% of median area income?

b. Preferences

1. ☒ Yes ☐ No: Has the PHA established preferences for admission to section 8 tenant-based assistance? (other than date and time of application) (if no, skip to subcomponent (5) **Special purpose section 8 assistance programs**)
2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences

- ☒ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- ☐ Victims of domestic violence
- ☐ Substandard housing
- ☒ Homelessness
- ☐ High rent burden (rent is > 50 percent of income)

Other preferences (select all that apply)

- ☐ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans' families
- ☒ Residents who live and/or work in your jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☒ Other preferences:

~~///~~ **Disabled**

~~///~~ **Households without children up to 10% of each notification round**

1. Homeless referrals - families and individuals (consistent with HUD's occupancy priorities for single individuals) referred from Portage County shelters or transitional housing programs providing written confirmation that they will be receiving follow-up supportive services from the referral agency. Agencies will be limited to two referrals per month.
2. Disabled referrals - mentally and physically disabled individuals and families referred by a Portage County social service agency providing written confirmation that they will be receiving follow-up housing and supportive services from the referral agency. Agencies will be limited to two referrals per month.

3. Landlord referral of in-place families suffering recent financial setback Families referred by their current landlord because the family has recently lost employment, and intend to staying place. This preference will only be implemented if the PMHA's Section 8 lease-up rate is 97% or below. Each participating landlord will be restricted to a maximum of two referrals per year.

In addition, applicants whose names have come to the top of the waiting list, but must postpone acceptance of Section 8 assistance, may be placed back at the top of the waiting list at a later date. This preference is intended to avoid penalizing tenants, who are residing in housing having a rental lease or program component with a specific time limit or expiration date, whose names have risen to the top of the Section 8 waiting list. Frequently, tenants under these circumstances, are not able to utilize the Section 8 subsidy at the time their name appears at the top of the waiting list due to the time commitments they are required to comply with. In order to discourage affected tenants to prematurely terminate their existing housing commitments, if after notification, the applicants wish to postpone the acceptance of the Section 8 subsidy, they may do so. These tenants would then be given the next available Section 8 subsidy upon completion of their housing commitment. These applicants include those tenants:

- a. residing in Section 8 Moderate Rehab units who have resided there for less than one year;
- b. residing in group homes or similar supportive, congregate housing and are less than 6 months from being able to live independently
- c. residing at a supportive services public housing site who have not fulfilled the terms of their family development plan and wish to remain on site until the completion of their plan, and
- d. tenants verifying that they are bound by the terms of an existing rental lease until a specific expiration date, that is less than 6 months from the date their name appeared at the top of the waiting list.

All other Section 8 waiting list households would be ranked by order of date of application, with preference given to the following:

Local residency - Local residents are those who:

- a. live in Portage County, or
- a. are employed in Portage County or are notified that they are hired to work in Portage County

Applicants having only the local residency preference will be selected based on a first-come, first-served basis. Those without any preference will fall after all applicants having the local residency preference. They will also be placed in first-come, first served order, based on date of application.

The percent (10%) of each group of applicants selected/notified from the waiting list will be applicants designated as "Other Single".

Ten percent (10%) of each group of applicants selected/notified from the waiting list will be applicants who are out-of-county residents. Out of county residents are those who do not live or work in Portage County.

*3. If the PHA will employ admissions preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.*

1 Date and Time

Former Federal preferences

- 1 Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)  
Victims of domestic violence  
Substandard housing
- 1 Homelessness  
High rent burden

Other preferences (select all that apply)

- ☐ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans' families
- ☒ Residents who live and/or work in your jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☒ Other preferences:  
~~NA~~ **Disabled**  
~~NA~~ **Households without children up to 10% of each notification round**

4. Among applicants on the waiting list with equal preference status, how are applicants selected? (select one)

- ☒ Date and time of application
- ☐ Drawing (lottery) or other random choice technique

5. If the PHA plans to employ preferences for "residents who live and/or work in the jurisdiction" (select one)

- ☒ This preference has previously been reviewed and approved by HUD
- ☐ The PHA requests approval for this preference through this PHA Plan

6. Relationship of preferences to income targeting requirements: (select one)

- ☐ The PHA applies preferences within income tiers
- ☒ Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements

**(5) Special Purpose Section 8 Assistance Programs** NA PMHA does not administer Special Purpose Section 8

a. In which documents or other reference materials are the policies governing eligibility, selection, and admissions to any special-purpose section 8 program administered by the PHA contained? (select all that apply)

- ☐ The Section 8 Administrative Plan
- ☐ Briefing sessions and written materials
- ☐ Other (list below)

b. How does the PHA announce the availability of any special-purpose section 8 programs to the public?

- ☐ Through published notices
- ☐ Other (list below)



#### **4. PHA Rent Determination Policies**

[24 CFR Part 903.7 9 (d)]

##### **A. Public Housing**

Exemptions: PHAs that do not administer public housing are not required to complete sub-component 4A.

##### **(1) Income Based Rent Policies**

Describe the PHA's income based rent setting policy/ies for public housing using, including discretionary (that is, not required by statute or regulation) income disregards and exclusions, in the appropriate spaces below.

a. Use of discretionary policies: (select one)

- ☐ The PHA will not employ any discretionary rent-setting policies for income based rent in public housing. Income-based rents are set at the higher of 30% of adjusted monthly income, 10% of unadjusted monthly income, the welfare rent, or minimum rent (less HUD mandatory deductions and exclusions). (If selected, skip to sub-component (2))

---or---

- ☒ The PHA employs discretionary policies for determining income based rent (If selected, continue to question b.)

b. Minimum Rent

1. What amount best reflects the PHA's minimum rent? (select one)

- ☒ \$0  
☐ \$1-\$25  
☐ \$26-\$50

2. ☐ Yes ☒ No: Has the PHA adopted any discretionary minimum rent hardship exemption policies?

3. If yes to question 2, list these policies below: **Reviewed on a case by case basis through the grievance procedures; however, NA due to \$0 minimum rent**

c. Rents set at less than 30% than adjusted income

1. ☒ Yes ☐ No: Does the PHA plan to charge rents at a fixed amount or percentage less than 30% of adjusted income?

2. If yes to above, list the amounts or percentages charged and the circumstances under which these will be used below:

As part of the Moving to Work demonstration, PMHA uses ceiling rents.

d. Which of the discretionary (optional) deductions and/or exclusions policies does the PHA plan to employ (select all that apply)

- ☐ For the earned income of a previously unemployed household member  
☒ For increases in earned income  
☒ Fixed amount (other than general rent-setting policy)

If yes, state amount/s and circumstances below: **\$500 deduction for full-time employment and/or full-time education per the MTW contract**

- ☐ Fixed percentage (other than general rent-setting policy)  
If yes, state percentage/s and circumstances below:
- ☒ For household heads  
☒ For other family members  
☐ For transportation expenses  
☐ For the non-reimbursed medical expenses of non-disabled or non-elderly families  
☒ Other : **Over-time and bonus income are excluded as well as interest from bank assets per**

**MTW contract**

e. Ceiling rents

1. Do you have ceiling rents? (rents set at a level lower than 30% of adjusted income) (select one)  
☒ Yes for all developments  
☐ Yes but only for some developments  
☐ No
2. For which kinds of developments are ceiling rents in place? (select all that apply)  
☒ For all developments  
☐ For all general occupancy developments (not elderly or disabled or elderly only)  
☐ For specified general occupancy developments  
☐ For certain parts of developments; e.g., the high-rise portion  
☐ For certain size units; e.g., larger bedroom sizes  
☐ Other (list below)
3. Select the space or spaces that best describe how you arrive at ceiling rents (select all that apply)  
☒ Market comparability study  
☒ Fair market rents (FMR)  
☐ 95<sup>th</sup> percentile rents  
☐ 75 percent of operating costs  
☐ 100 percent of operating costs for general occupancy (family) developments  
☐ Operating costs plus debt service  
☐ The "rental value" of the unit  
☐ Other (list below)

f. Rent re-determinations:

1. Between income reexaminations, how often must tenants report changes in income or family composition to the PHA such that the changes result in an adjustment to rent? (select all that apply)  
☐ Never  
☐ At family option  
☒ Any time the family experiences an income increase  
☐ Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold) \_\_\_\_\_  
☐ Other (list below)

- g. ☐ Yes ☒ No: Does the PHA plan to implement individual savings accounts for residents (ISAs) as an alternative to the required 12 month disallowance of earned income and phasing in of rent increases in the next year?

**(2) Flat Rents**

1. In setting the market-based flat rents, what sources of information did the PHA use to establish comparability? (select all that apply.)

- ☐ The section 8 rent reasonableness study of comparable housing  
☐ Survey of rents listed in local newspaper  
☐ Survey of similar unassisted units in the neighborhood  
☒ Other: **NA per Moving to Work contract**

## B. Section 8 Tenant-Based Assistance

Exemptions: PHAs that do not administer Section 8 tenant-based assistance are not required to complete sub-component 4B. **Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

### (1) Payment Standards

Describe the voucher payment standards and policies.

- a. What is the PHA's payment standard? (select the category that best describes your standard)
- ☐ At or above 90% but below 100% of FMR  
☐ 100% of FMR  
☒ Above 100% but at or below 110% of FMR  
☐ Above 110% of FMR (if HUD approved; describe circumstances below)
- b. If the payment standard is lower than FMR, why has the PHA selected this standard? (select all that apply)
- ☐ FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area  
☐ The PHA has chosen to serve additional families by lowering the payment standard  
☐ Reflects market or submarket  
☐ Other (list below)
- c. If the payment standard is higher than FMR, why has the PHA chosen this level? (select all that apply)
- ☒ FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area  
☒ Reflects market or submarket  
☒ To increase housing options for families  
☐ Other (list below)
- d. How often are payment standards reevaluated for adequacy? (select one)
- ☒ Annually  
☐ Other (list below)
- e. What factors will the PHA consider in its assessment of the adequacy of its payment standard? (select all that apply)
- ☒ Success rates of assisted families  
☒ Rent burdens of assisted families  
☐ Other (list below)

## **(2) Minimum Rent**

a. What amount best reflects the PHA's minimum rent? (select one)

- ☒ \$0  
☐ \$1-\$25  
☐ \$26-\$50

b. ☒ Yes ☐ No: Has the PHA adopted any discretionary minimum rent hardship exemption policies?  
**Taken on a case by case basis through the grievance procedure; however, NA due to \$0 minimum rent**

## **5. Operations and Management**

[24 CFR Part 903.7 9 (e)]

Exemptions from Component 5: High performing and small PHAs are not required to complete this section. Section 8 only PHAs must complete parts A, B, and C(2)

**(Portage MHA is a high performing PHA)**

### **A. PHA Management Structure**

Describe the PHA's management structure and organization.

(select one)

- ☐ An organization chart showing the PHA's management structure and organization is attached.  
☐ A brief description of the management structure and organization of the PHA follows:

### **B. HUD Programs Under PHA Management**

?? List Federal programs administered by the PHA, number of families served at the beginning of the upcoming fiscal year, and expected turnover in each. (Use "NA" to indicate that the PHA does not operate any of the programs listed below.)

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing		
Section 8 Vouchers		
Section 8 Certificates		
Section 8 Mod Rehab		
Special Purpose Section 8 Certificates/Vouchers (list individually)		
Public Housing Drug Elimination Program (PHDEP)		
Other Federal Programs(list individually)		

### **C. Management and Maintenance Policies**

List the PHA's public housing management and maintenance policy documents, manuals and handbooks that contain the Agency's rules, standards, and policies that govern maintenance and management of public housing, including a

description of any measures necessary for the prevention or eradication of pest infestation (which includes cockroach infestation) and the policies governing Section 8 management.

(1) Public Housing Maintenance and Management: (list below)

(2) Section 8 Management: (list below)

## **6. PHA Grievance Procedures**

[24 CFR Part 903.7 9 (f)]

Exemptions from component 6: High performing PHAs are not required to complete component 6. Section 8-Only PHAs are exempt from sub-component 6A.

**(Portage MHA is a high performing PHA)**

### **A. Public Housing**

1. ☐ Yes ☐ No: Has the PHA established any written grievance procedures in addition to federal requirements found at 24 CFR Part 966, Subpart B, for residents of public housing?

If yes, list additions to federal requirements below:

2. Which PHA office should residents or applicants to public housing contact to initiate the PHA grievance process? (select all that apply)
- ☐ PHA main administrative office
  - ☐ PHA development management offices
  - ☐ Other (list below)

### **B. Section 8 Tenant-Based Assistance**

1. ☐ Yes ☐ No: Has the PHA established informal review procedures for applicants to the Section 8 tenant-based assistance program and informal hearing procedures for families assisted by the Section 8 tenant-based assistance program in addition to federal requirements found at 24 CFR 982?

If yes, list additions to federal requirements below:

2. Which PHA office should applicants or assisted families contact to initiate the informal review and informal hearing processes? (select all that apply)
- ☐ PHA main administrative office
  - ☐ Other (list below)

## **7. Capital Improvement Needs**

[24 CFR Part 903.7 9 (g)]

Exemptions from Component 7: Section 8 only PHAs are not required to complete this component and may skip to Component 8.

### **A. Capital Fund Activities**

Exemptions from sub-component 7A: PHAs that will not participate in the Capital Fund Program may skip to component 7B. All other PHAs must complete 7A as instructed.

### **(1) Capital Fund Program Annual Statement**

Using parts I, II, and III of the Annual Statement for the Capital Fund Program (CFP), identify capital activities the PHA is proposing for the upcoming year to ensure long-term physical and social viability of its public housing developments. This statement can be completed by using the CFP Annual Statement tables provided in the table library at the end of the PHA Plan template **OR**, at the PHA's option, by completing and attaching a properly updated HUD-52837.

Select one:

☒ The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at **Attachment B**

-or-

☐ The Capital Fund Program Annual Statement is provided below: (if selected, copy the CFP Annual Statement from the Table Library and insert here)

**(2) Optional 5-Year Action Plan**

Agencies are encouraged to include a 5-Year Action Plan covering capital work items. This statement can be completed by using the 5 Year Action Plan table provided in the table library at the end of the PHA Plan template **OR** by completing and attaching a properly updated HUD-52834.

a. ☒ Yes ☐ No: Is the PHA providing an optional 5-Year Action Plan for the Capital Fund? (if no, skip to sub-component 7B)

b. If yes to question a, select one:

☒ The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at **Attachment B**

-or-

☐ The Capital Fund Program 5-Year Action Plan is provided below: (if selected, copy the CFP optional 5 Year Action Plan from the Table Library and insert here)

**B. HOPE VI and Public Housing Development and Replacement Activities (Non-Capital Fund)**

Applicability of sub-component 7B: All PHAs administering public housing. Identify any approved HOPE VI and/or public housing development or replacement activities not described in the Capital Fund Program Annual Statement.

☐ Yes ☒ No: a) Has the PHA received a HOPE VI revitalization grant? (if no, skip to question c; if yes, provide responses to question b for each grant, copying and completing as many times as necessary)  
b) Status of HOPE VI revitalization grant (complete one set of questions for each grant)

1. Development name:

2. Development (project) number:

3. Status of grant: (select the statement that best describes the current status)

- ☐ Revitalization Plan under development
- ☐ Revitalization Plan submitted, pending approval
- ☐ Revitalization Plan approved
- ☐ Activities pursuant to an approved Revitalization Plan underway

☐ Yes ☒ No: c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year?  
If yes, list development name/s below:

☐ Yes ☒ No: d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year?  
If yes, list developments or activities below:

☐ Yes ☒ No: e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement?  
If yes, list developments or activities below:

## **8. Demolition and Disposition**

[24 CFR Part 903.7 9 (h)]

Applicability of component 8: Section 8 only PHAs are not required to complete this section.

1. ☐ Yes ☒ No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 of the U.S. Housing Act of 1937 (42 U.S.C. 1437p)) in the plan Fiscal Year? (If “No”, skip to component 9; if “yes”, complete one activity description for each development.)

### 2. Activity Description

☐ Yes ☐ No: Has the PHA provided the activities description information in the **optional** Public Housing Asset Management Table? (If “yes”, skip to component 9. If “No”, complete the Activity Description table below.)

<b>Demolition/Disposition Activity Description</b>
1a. Development name:
1b. Development (project) number:
2. Activity type: Demolition <input type="checkbox"/> Disposition <input type="checkbox"/>
3. Application status (select one) Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: (DD/MM/YY)
5. Number of units affected:
6. Coverage of action (select one) <input type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: b. Projected end date of activity:

## **9. Designation of Public Housing for Occupancy by Elderly Families or Families with Disabilities or Elderly Families and Families with Disabilities**

[24 CFR Part 903.7 9 (i)]

Exemptions from Component 9; Section 8 only PHAs are not required to complete this section.

1. ☐ Yes ☒ No: Has the PHA designated or applied for approval to designate or does the PHA plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly families and families with disabilities or will apply for designation for occupancy by only elderly families or only families with disabilities, or by elderly families and families with disabilities as provided by section 7 of the U.S. Housing Act of 1937 (42 U.S.C. 1437e) in the upcoming fiscal year? (If “No”, skip to component 10. If “yes”, complete one activity description for each development, unless the PHA is eligible to complete a streamlined submission; PHAs completing streamlined submissions may skip to component 10.)

2. Activity Description

- ☐ Yes ☐ No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If “yes”, skip to component 10. If “No”, complete the Activity Description table below.

Designation of Public Housing Activity Description
1a. Development name:
1b. Development (project) number:
2. Designation type: Occupancy by only the elderly <input type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one) Approved; included in the PHA's Designation Plan <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: <u>(DD/MM/YY)</u>
5. If approved, will this designation constitute a (select one) <input type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected:
7. Coverage of action (select one) <input type="checkbox"/> Part of the development <input type="checkbox"/> Total development



## **10. Conversion of Public Housing to Tenant-Based Assistance**

[24 CFR Part 903.7 9 (j)]

Exemptions from Component 10; Section 8 only PHAs are not required to complete this section.

### **A. Assessments of Reasonable Revitalization Pursuant to section 202 of the HUD FY 1996 HUD Appropriations Act**

1. ☐ Yes ☒ No: Have any of the PHA's developments or portions of developments been identified by HUD or the PHA as covered under section 202 of the HUD FY 1996 HUD Appropriations Act? (If "No", skip to component 11; if "yes", complete one activity description for each identified development, unless eligible to complete a streamlined submission. PHAs completing streamlined submissions may skip to component 11.)

2. Activity Description

- ☐ Yes ☐ No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If "yes", skip to component 11. If "No", complete the Activity Description table below.

<b>Conversion of Public Housing Activity Description</b>
1a. Development name: 1b. Development (project) number:
2. What is the status of the required assessment? <input type="checkbox"/> Assessment underway <input type="checkbox"/> Assessment results submitted to HUD <input type="checkbox"/> Assessment results approved by HUD (if marked, proceed to next question) <input type="checkbox"/> Other (explain below)
3. <input type="checkbox"/> Yes <input type="checkbox"/> No: Is a Conversion Plan required? (If yes, go to block 4; if no, go to block 5.)
4. Status of Conversion Plan (select the statement that best describes the current status) <input type="checkbox"/> Conversion Plan in development <input type="checkbox"/> Conversion Plan submitted to HUD on: (DD/MM/YYYY) <input type="checkbox"/> Conversion Plan approved by HUD on: (DD/MM/YYYY) <input type="checkbox"/> Activities pursuant to HUD-approved Conversion Plan underway
5. Description of how requirements of Section 202 are being satisfied by means other than conversion (select one) <input type="checkbox"/> Units addressed in a pending or approved demolition application (date submitted or approved: ) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved: ) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved: ) <input type="checkbox"/> Requirements no longer applicable: vacancy rates are less than 10 percent <input type="checkbox"/> Requirements no longer applicable: site now has less than 300 units <input type="checkbox"/> Other: (describe below)

### **B. Reserved for Conversions pursuant to Section 22 of the U.S. Housing Act of 1937**

**C. Reserved for Conversions pursuant to Section 33 of the U.S. Housing Act of 1937**

**11. Homeownership Programs Administered by the PHA**

[24 CFR Part 903.7 9 (k)]

**A. Public Housing**

Exemptions from Component 11A: Section 8 only PHAs are not required to complete 11A.

1. ☐ Yes ☒ No: Does the PHA administer any homeownership programs administered by the PHA under an approved section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved HOPE I program (42 U.S.C. 1437aaa) or has the PHA applied or plan to apply to administer any homeownership programs under section 5(h), the HOPE I program, or section 32 of the U.S. Housing Act of 1937 (42 U.S.C. 1437z-4). (If “No”, skip to component 11B; if “yes”, complete one activity description for each applicable program/plan, unless eligible to complete a streamlined submission due to **small PHA** or **high performing PHA** status. PHAs completing streamlined submissions may skip to component 11B.)

2. Activity Description

- ☐ Yes ☐ No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? (If “yes”, skip to component 12. If “No”, complete the Activity Description table below.)

<b>Public Housing Homeownership Activity Description (Complete one for each development affected)</b>
1a. Development name: 1b. Development (project) number:
2. Federal Program authority: <input type="checkbox"/> HOPE I <input type="checkbox"/> 5(h) <input type="checkbox"/> Turnkey III <input type="checkbox"/> Section 32 of the USHA of 1937 (effective 10/1/99)
3. Application status: (select one) <input type="checkbox"/> Approved; included in the PHA’s Homeownership Plan/Program <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: <u>(DD/MM/YYYY)</u>
5. Number of units affected: 6. Coverage of action: (select one) <input type="checkbox"/> Part of the development <input type="checkbox"/> Total development

## B. Section 8 Tenant Based Assistance

1. ☐ Yes ☒ No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982 ? (If “No”, skip to component 12; if “yes”, describe each program using the table below (copy and complete questions for each program identified), unless the PHA is eligible to complete a streamlined submission due to high performer status. **High performing PHAs** may skip to component 12.)  
PMHA’s use of Section 8 for homeownership is a provision of the Moving To Work Agreement.

### 2. Program Description:

#### a. Size of Program

- ☐ Yes ☐ No: Will the PHA limit the number of families participating in the section 8 homeownership option?

If the answer to the question above was yes, which statement best describes the number of participants? (select one)

- ☐ 25 or fewer participants  
☐ 26 - 50 participants  
☐ 51 to 100 participants  
☐ more than 100 participants

#### b. PHA-established eligibility criteria

- ☐ Yes ☐ No: Will the PHA’s program have eligibility criteria for participation in its Section 8 Homeownership Option program in addition to HUD criteria?  
If yes, list criteria below:

## **12. PHA Community Service and Self-sufficiency Programs**

[24 CFR Part 903.7 9 (l)]

Exemptions from Component 12: High performing and small PHAs are not required to complete this component. Section 8-Only PHAs are not required to complete sub-component C.

**(Portage MHA is a high performing PHA)**

### A. PHA Coordination with the Welfare (TANF) Agency

#### 1. Cooperative agreements:

- ☐ Yes ☐ No: Has the PHA has entered into a cooperative agreement with the TANF Agency, to share information and/or target supportive services (as contemplated by section 12(d)(7) of the Housing Act of 1937)?

If yes, what was the date that agreement was signed? DD/MM/YY

#### 2. Other coordination efforts between the PHA and TANF agency (select all that apply)

- ☐ Client referrals  
☐ Information sharing regarding mutual clients (for rent determinations and otherwise)  
☐ Coordinate the provision of specific social and self-sufficiency services and programs to eligible families  
☐ Jointly administer programs  
☐ Partner to administer a HUD Welfare-to-Work voucher program

☐ Joint administration of other demonstration program

**B. Services and programs offered to residents and participants**

**(1) General**

**a. Self-Sufficiency Policies**

Which, if any of the following discretionary policies will the PHA employ to enhance the economic and social self-sufficiency of assisted families in the following areas? (select all that apply)

- ☐ Public housing rent determination policies
- ☐ Public housing admissions policies
- ☐ Section 8 admissions policies
- ☐ Preference in admission to section 8 for certain public housing families
- ☐ Preferences for families working or engaging in training or education programs for non-housing programs operated or coordinated by the PHA
- ☐ Preference/eligibility for public housing homeownership option participation
- ☐ Preference/eligibility for section 8 homeownership option participation
- ☐ Other policies (list below)

**b. Economic and Social self-sufficiency programs**

☐ Yes ☐ No: Does the PHA coordinate, promote or provide any programs to enhance the economic and social self-sufficiency of residents? (If "yes", complete the following table; if "no" skip to sub-component 2, Family Self Sufficiency Programs. The position of the table may be altered to facilitate its use. )

Services and Programs				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)

**(2) Family Self Sufficiency program/s**

**a. Participation Description**

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2000 Estimate)	Actual Number of Participants (As of: DD/MM/YY)
Public Housing		
Section 8		

- b. ☐ Yes ☐ No: If the PHA is not maintaining the minimum program size required by HUD, does the most recent FSS Action Plan address the steps the PHA plans to take to achieve at least the minimum program size?  
If no, list steps the PHA will take below:

### C. Welfare Benefit Reductions

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)
- ☐ Adopting appropriate changes to the PHA's public housing rent determination policies and train staff to carry out those policies
  - ☐ Informing residents of new policy on admission and reexamination
  - ☐ Actively notifying residents of new policy at times in addition to admission and reexamination.
  - ☐ Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
  - ☐ Establishing a protocol for exchange of information with all appropriate TANF agencies
  - ☐ Other: (list below)

### D. Reserved for Community Service Requirement pursuant to section 12(c) of the U.S. Housing Act of 1937

## 13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.7 9 (m)]

Exemptions from Component 13: High performing and small PHAs not participating in PHDEP and Section 8 Only PHAs may skip to component 15. High Performing and small PHAs that are participating in PHDEP and are submitting a PHDEP Plan with this PHA Plan may skip to sub-component D.

### A. Need for measures to ensure the safety of public housing residents

1. Describe the need for measures to ensure the safety of public housing residents (select all that apply)
- ☐ High incidence of violent and/or drug-related crime in some or all of the PHA's developments
  - ☒ High incidence of violent and/or drug-related crime in the areas surrounding or adjacent to the PHA's developments (selected locations)
  - ☒ Residents fearful for their safety and/or the safety of their children
  - ☐ Observed lower-level crime, vandalism and/or graffiti
  - ☐ People on waiting list unwilling to move into one or more developments due to perceived and/or actual levels of violent and/or drug-related crime
  - ☐ Other (describe below)
2. What information or data did the PHA used to determine the need for PHA actions to improve safety of residents (select all that apply).
- ☒ Safety and security survey of residents
  - ☐ Analysis of crime statistics over time for crimes committed "in and around" public housing authority

- ☐ Analysis of cost trends over time for repair of vandalism and removal of graffiti
- ☒ Resident reports
- ☐ PHA employee reports
- ☒ Police reports
- ☐ Demonstrable, quantifiable success with previous or ongoing anticrime/anti drug programs
- ☐ Other (describe below)

2. Which developments are most affected? (list below)  
All multi-family developments excluding elderly and disabled

**B. Crime and Drug Prevention activities the PHA has undertaken or plans to undertake in the next PHA fiscal year**

1. List the crime prevention activities the PHA has undertaken or plans to undertake: (select all that apply)
- ☒ Contracting with outside and/or resident organizations for the provision of crime- and/or drug-prevention activities
  - ☐ Crime Prevention Through Environmental Design
  - ☒ Activities targeted to at-risk youth, adults, or seniors
  - ☐ Volunteer Resident Patrol/Block Watchers Program
  - ☒ Other (describe below)  
Additional law enforcement through Sheriff  
Capital improvements to enhance security

3. Which developments are most affected? (list below)  
All tenants will be equally eligible to participate

**C. Coordination between PHA and the police**

1. Describe the coordination between the PHA and the appropriate police precincts for carrying out crime prevention measures and activities: (select all that apply)
- ☐ Police involvement in development, implementation, and/or ongoing evaluation of drug-elimination plan
  - ☒ Police provide crime data to housing authority staff for analysis and action
  - ☒ Police have established a physical presence on housing authority property (e.g., community policing office, officer in residence)
  - ☐ Police regularly testify in and otherwise support eviction cases
  - ☒ Police regularly meet with the PHA management and residents
  - ☒ Agreement between PHA and local law enforcement agency for provision of above-baseline law enforcement services
  - ☐ Other activities (list below)

2. Which developments are most affected? **All senior and multi-family developments**

**D. Additional information as required by PHDEP/PHDEP Plan**

PHAs eligible for FY 2000 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

- ☒ Yes ☐ No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- ☐ Yes ☒ No: Has the PHA included the PHDEP Plan for FY 2003 in this PHA Plan?

☐ Yes ☒ No: This PHDEP Plan is Attachment C

## **14. RESERVED FOR PET POLICY**

[24 CFR Part 903.7 9 (n)]

Pet Policy is in Supporting Documents Binder

## **15. Civil Rights Certifications**

[24 CFR Part 903.7 9 (o)]

Civil rights certifications are included in the PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations.

## **16. Fiscal Audit**

[24 CFR Part 903.7 9 (p)]

1. ☒ Yes ☐ No: Is the PHA required to have an audit conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h))?  
(If no, skip to component 17.)
2. ☒ Yes ☐ No: Was the most recent fiscal audit submitted to HUD?
3. ☐ Yes ☒ No: Were there any findings as the result of that audit?
4. ☐ Yes ☐ No: If there were any findings, do any remain unresolved?  
If yes, how many unresolved findings remain? \_\_\_\_\_
5. ☐ Yes ☐ No: Have responses to any unresolved findings been submitted to HUD?  
If not, when are they due (state below)?

## **17. PHA Asset Management**

[24 CFR Part 903.7 9 (q)]

Exemptions from component 17: Section 8 Only PHAs are not required to complete this component. High performing and small PHAs are not required to complete this component.

**(Portage MHA is a high performing PHA)**

1. ☐ Yes ☐ No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock, including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs that have **not** been addressed elsewhere in this PHA Plan?
2. What types of asset management activities will the PHA undertake? (select all that apply)  
☐ Not applicable  
☐ Private management  
☐ Development-based accounting  
☐ Comprehensive stock assessment  
☐ Other: (list below)
3. ☐ Yes ☐ No: Has the PHA included descriptions of asset management activities in the **optional** Public Housing Asset Management Table?



## **18. Other Information**

[24 CFR Part 903.7 9 (r)]

### **A. Resident Advisory Board Recommendations**

1. ☒ Yes ☐ No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?

2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)

☒ Attached at Attachment D

☐ Provided below:

3. In what manner did the PHA address those comments? (select all that apply)

☒ Considered comments, but determined that no changes to the PHA Plan were necessary.

☐ The PHA changed portions of the PHA Plan in response to comments

List changes below:

Added exterior lighting in PHDEP submission at request of residents

☐ Other: (list below)

Developed Pet Policy based on comments.

Developed Community Service requirements based on comments

### **B. Description of Election process for Residents on the PHA Board**

1. ☐ Yes ☒ No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)

2. ☐ Yes ☒ No: Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.)

3. Description of Resident Election Process

a. Nomination of candidates for place on the ballot: (select all that apply)

☐ Candidates were nominated by resident and assisted family organizations

☐ Candidates could be nominated by any adult recipient of PHA assistance

☐ Self-nomination: Candidates registered with the PHA and requested a place on ballot

☐ Other: (describe)

b. Eligible candidates: (select one)

☐ Any recipient of PHA assistance

☐ Any head of household receiving PHA assistance

☐ Any adult recipient of PHA assistance

☐ Any adult member of a resident or assisted family organization

☐ Other (list)

c. Eligible voters: (select all that apply)

☐ All adult recipients of PHA assistance (public housing and section 8 tenant-based assistance)

☐ Representatives of all PHA resident and assisted family organizations

☐ Other (list)

### C. Statement of Consistency with the Consolidated Plan

For each applicable Consolidated Plan, make the following statement (copy questions as many times as necessary).

1. Consolidated Plan jurisdiction: **City of Kent, Ohio**

2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)

- ☒ The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
- ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- ☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- ☐ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)

~~/~~ ~~/~~ **Portage MHA will continue to provide transitional housing at Renaissance Place**

~~/~~ ~~/~~ **Expand use of Section 8 assistance to persons with disabilities**

~~/~~ ~~/~~ **Continue to provide development assistance to agencies serving persons with disabilities**

~~/~~ ~~/~~ **Continue to provide Section 8 assistance to large family households**

~~/~~ ~~/~~ **Through Portage HOPES, begin homeownership program**

☐ Other: (list below)

3. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

On-going communication

4. Consolidated Plan jurisdiction: **Portage County, Ohio – State of Ohio**

5. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)

- ☒ The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
- ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- ☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- ☐ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)

~~/~~ ~~/~~ **Portage MHA will continue to provide transitional housing at Renaissance Place**

~~/~~ ~~/~~ **Expand use of Section 8 assistance to persons with disabilities**

~~/~~ ~~/~~ **Continue to provide development assistance to agencies serving persons with disabilities**

~~/~~ ~~/~~ **Continue to provide Section 8 assistance to large family households**

~~/~~ ~~/~~ **Through Portage HOPES, begin homeownership program for Public Housing tenants**

~~/~~ ~~/~~ **Market Section 8 program to attract new landlords and expand housing choice**

6. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

On-going communication

**D. Other Information Required by HUD**

Use this section to provide any additional information requested by HUD.

**19. Definition of “Substantial Deviation” and “Significant Amendment or Modification”**

[24 CFR Part 903.7 9 (r)]

Significant amendments or significant modifications to the 5 Year or Annual Plan will be subject to the requirements pertaining to input of the Participant Advisory Committee, Consolidated Plan consistency, and public comment process. “Significant amendments” or “significant modifications” are defined as discretionary changes that:

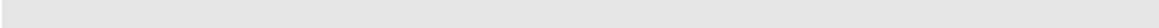
- a) fundamentally change the PMHA’s mission statement, goals, or objectives,
- or
- b) fundamentally change PMHA plans or policies in a manner that is inconsistent with the existing mission, goals or objectives,
- and
- c) require formal approval of the Board of Commissioners.

## **Attachments**

Use this section to provide any additional attachments referenced in the Plans.

- Attachment A, Deconcentration Policy**
- Attachment B, 2003 Capital Fund Annual Statement & Five-Year Capital Fund Plan**
- Attachment C, Progress in Meeting 5 Year Plan Mission and Goals**
- Attachment D, Resident Advisory Board Comments**
- Attachment E, Membership of the Resident Advisory Board**
- Attachment F, Resident Membership of the PHA Governing Board**
- Attachment G, RASS Follow-up Plan**
- Attachment H, Voluntary Conversion Initial Assessment**
- Attachment I, MTW Occupancy Change**
- Attachment J, Capital Fund P&E OH12P031707-99 (6/30/02)**
- Attachment K, Capital Fund P&E OH12P031501-00 (6/30/02)**
- Attachment L, Capital Fund P&E OH12P031501-01 (6/30/02)**
- Attachment M, Capital Fund P&E OH12P031501-02 (6/30/02)**
- Attachment N, MTW Rent Policy Change**
- Attachment O, 707-Final P&E Ending 09/30/2002**





## **Attachment A**

### **Year 2002 Income Deconcentration Analysis**

Under the provisions of the Quality Housing and Work Responsibility Act, housing authorities must analyze their public housing for concentrations of poverty in their developments. The following summarizes the results and methodology of PMHA's analysis, using data from April 2002.

#### **Moving To Work Exclusions**

The PMHA's Moving To Work program has two objectives that impact upon the income deconcentration goal of the QHWRRA. The two MTW objectives that impact the deconcentration goal include the objectives that call for: a) provision of self-sufficiency supportive services on site at two public housing locations and b) the use of housing with more amenities as an incentive for self-sufficiency.

The first objective involves the provision of services coordinated by PATH at Community Estates and Renaissance Place. The MTW waivers incorporate the PATH program requirement that new admissions under the PATH program at these two sites be restricted to the homeless. Consequently, the incoming PATH participants are coming from an unstable situation, and frequently, their incomes are lower. Thus, it would be expected that newly admitted tenants at these two developments would have income relatively lower than the incomes for tenants occupying the other PMHA developments.

Secondly, the objective involving the use of more desirable housing as an incentive, involves the deliberate designation of scattered site units for those tenants having higher incomes. In order to reward families' progress toward economic self-sufficiency, the scattered site units are reserved for those families meeting certain criteria, which include meeting a required minimum income level. Thus, over time, as this feature is implemented, the scattered site projects will reflect a higher income level.

Therefore, based on the MTW waivers granted to the PMHA for supportive services and transfers to scattered sites, the following projects will not be covered by the PMHA's annual deconcentration analysis in the future:

31-01 Community Estates	31-02 Scattered site - Rehab
31-15 Renaissance Place	31-10 Scattered site - New construction

#### **Analysis**

Four methods were utilized in this analysis of the incomes of residents at the four subject developments:

31-01 Athena Gardens	31-03 Harvest Woods
31-05 Town Square Villas	31-09 Heritage Knolls

The first analysis involved assigning each family to one of three income categories: extremely low income, very low income, and low income. As can be

seen on the following table, the majority (66%) of units at these developments fall within the extremely low -income category:

**Table I**  
**Income Distribution at Multi -Family Sites**  
**Based on April 2002 Data**

Total # of occupied units-113	<b>Extremely Low-Income</b>		<b>Very Low-Income</b>		<b>Low Income</b>		<b>Over Income</b>
	#Units	Percent	#Units	Percent	#Units	Percent	#%
Athena Gardens	20	80%	3	12%	2	8%	0
Harvest Woods	20	71%	8	29%	0	0%	0
Town Square	19	63%	7	23%	4	13%	0
Heritage Knolls	16	53%	9	30%	4	13%	1 1%
<b>Total</b>	<b>75</b>	<b>66%</b>	<b>27</b>	<b>24%</b>	<b>10</b>	<b>9%</b>	<b>11%</b>

Definition of Income Ranges

Family Size	Extremely Low Income (below 30% median)	Very Low Income (31%-50% median)	Low Income (51%-80% of median)
	(\$)	(\$)	(\$)
1	11,700	19,450	31,150
2	13,350	22,250	35,600
3	15,000	25,000	40,050
4	16,700	27,800	44,500
5	18,000	30,000	48,050
6	19,350	32,250	51,600

Based on 2000 data, 93% of units at these developments fell within the Extremely Low -Income range compared to 64% in 2001 and 66% in 2002.

The April 2002 data demonstrates a decrease in the Very Low -Income range from 34 households in 2001 to 27 in 2002. There were zero households falling within this category in 2000.

However, the number of households falling into the Low -Income range has steadily increased over the past three years. In 2000, there were 3 families in this category compared to 7 in 2001 and 10 in April 2002. In addition, there was 1 household that was over the income guidelines. It should be noted that this



household's income exceeded the "Low -Income" range during the first quarter of 2002.

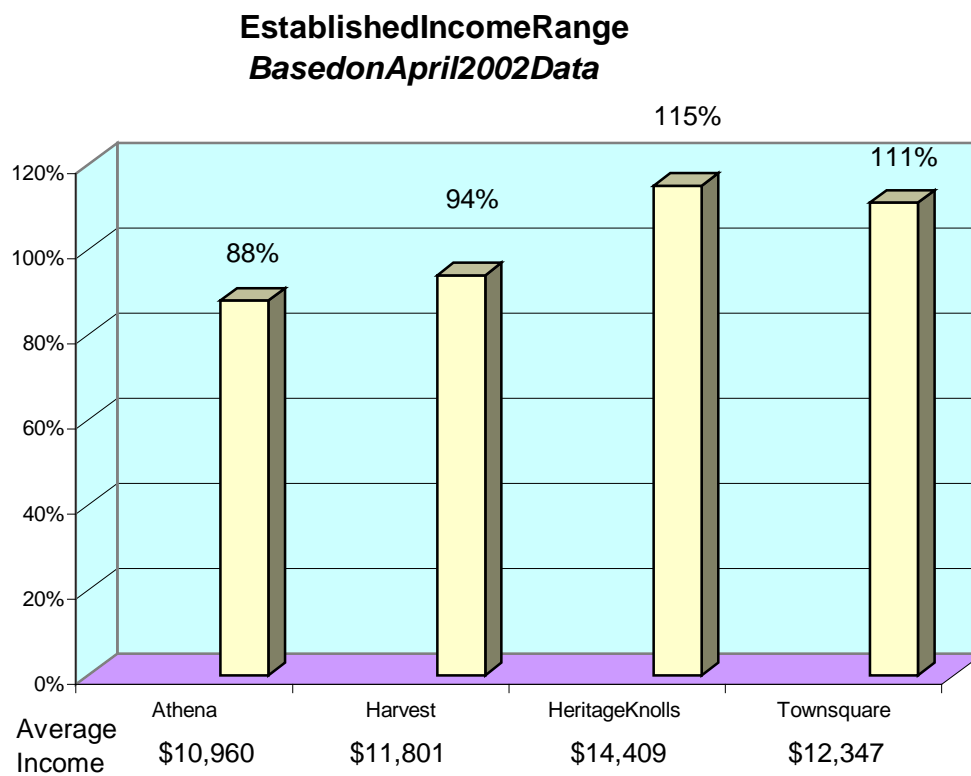
Moving to Work features, welfare reform and a booming economy were among the factors affecting the increasing number of households moving from the Extremely Low -Income range to Very -Low Income and Low Income ranges.

However, the PMHA experienced a 4% increase in the number of families falling within the Extremely Low -Income range over the past year residing at these four developments. In part, the increase was due to the number of higher -income families leaving public housing and being replaced with new residents falling within the Extremely Low -Income range.

For example, during 2001, there were 15 voluntary exits from these four developments. 80% had wage income compared to 63% for all PMHA Family Units. The average income of those exits with wages was \$18,833 compared to \$12,189 for all PMHA Family Units.

A second method of comparison consisted of calculating the average income for each development and then comparing each to the average income for all four developments. The average income for all four (\$12,504) served as the basis for the Established Income Range. Each average income per development falls within the Established Income Range (85% -115% of the average income for all noted developments).

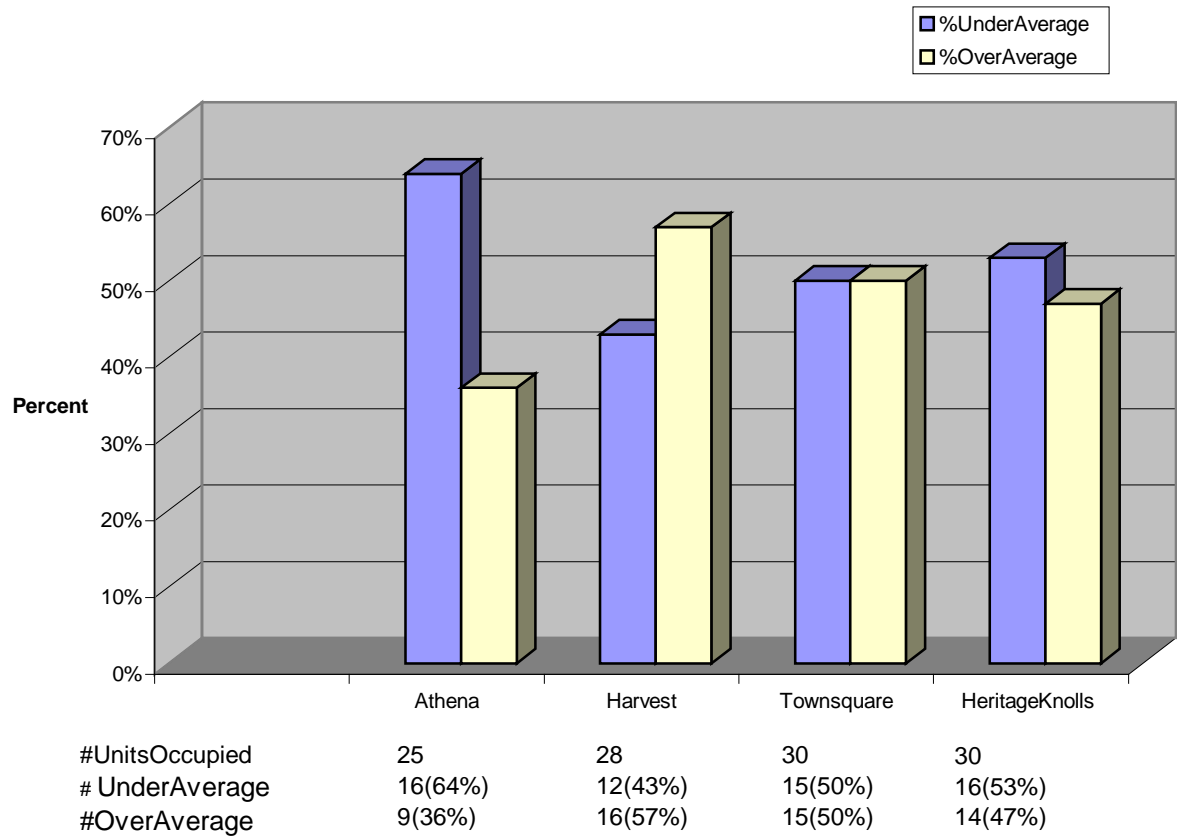
A third method involved the comparison of the number of units at each development that are over and under the average annual income. The following bar charts illustrate these second and third comparative methods used for analysis:



PMHAAverageIncome:\$12,504

**Note:**30%of2002MedianIncomeforPortageCountyis **\$16,680**

**Units Over and Under Average Annual Income of \$12,504  
April 2002**



The percentage distribution of over/under average income residents at Athena Gardens had a 12 -point difference in 2001 as compared to a 28 -point difference in 2002. An analysis was undertaken to understand this difference.

During 2001, there were six exits. The average income among the residents leaving Athena Gardens was \$18,577 compared to an average income of \$10,999 among the move -ins. This income disparity is noted below:

<b>Exits</b>	<b>Move-Ins</b>
<b>Income</b>	<b>Income</b>
\$25,895	\$19,712
\$21,735	\$19,426
\$21,400	\$14,942
\$18,033	\$6,600
\$18,020	\$4,476
\$6,384	\$840

Five of the six exits had incomes exceeding the average income (\$12,189) for all PMHA Family Units. It appears that Athena Gardens is a positive example of PMHA's Moving -To-Work program. Although this development currently has the lowest average income among the four developments covered by the deconcentration rule, it falls within the established income range.

Another example of MTW is Heritage Knolls. The average income of Heritage Knolls residents (\$14,409) places it at 115% of the established income range. However, when comparing the percentage distribution of residents, only 53% exceed the average income. The higher average income of Heritage Knolls is due to a few residents having significant incomes. For example, one household has an income of \$41,308 and three have incomes exceeding \$30,000. Each of these households has been in residency at least six years, and three of the four are female -headed. These are households that are working their way toward self sufficiency and eventually from public housing. With a total population of 30 units, these four households alone comprise 13% of all Heritage Knolls households.

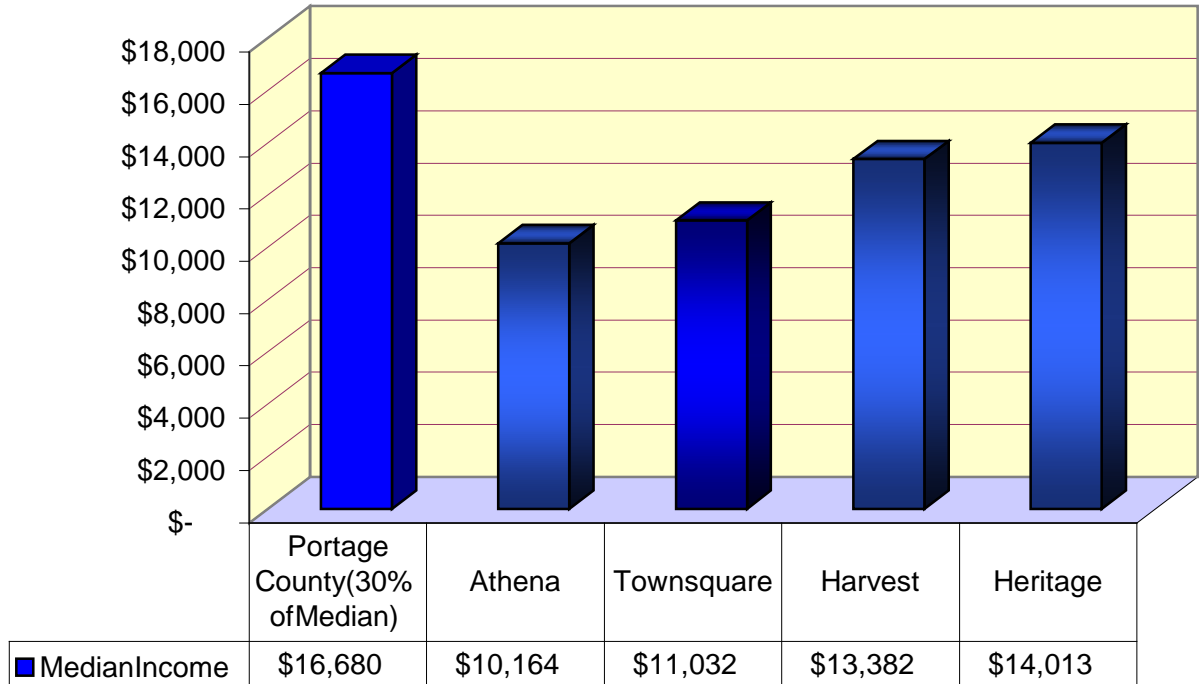
The number of units at each development is noted below:

Athena Gardens 31 -01	25
Harvest Woods 31 -03	28
Heritage Knolls 31 -09	30
Townsquare 31-05	30

Because of the small size of these developments, exits or income changes among 4 or 5 households provoke a significant impact on the whole. Because the PMHA undertakes an analysis of tenant incomes, exits, rents, etc. at least annually, trends or patterns of concentrations of poverty can be identified and addressed if needed.

The last method of analysis included comparing the median income for each development to 30% of the current median income for Portage County (\$55,600 ). As noted in the chart below, each PMHA development has a median income lower than 30% of Portage County median income.

**Comparison of Median Incomes  
to 30% of Median Income for Portage County**



Note: FY2002 Data for Median Family Income for Portage County is \$55,600

## Conclusion

The PMHA developments fall within the Established Income Range of Average Income - \$12,504 based on 2002 data. Therefore, the staff recommends that no revisions be made to the public housing admissions policy at this time.

### **Component 3, (6) Deconcentration and Income Mixing**

a. ☒ Yes ☐ No: Does the PHA have any general occupancy (family) public housing developments covered by the deconcentration rule? If no, this section is complete. If yes, continue to the next question.

b. ☐ Yes ☒ No: Do any of these covered developments have average incomes above or below 85% to 15% of the average incomes of all such developments? If no, this section is complete.

If yes, list these developments as follows:

Deconcentration Policy for Covered Developments				
Development Name:	Number of Units	Explanation (if any) [see step 4 at 903.2(c)(1)(iv)]		Deconcentration policy (if no explanation) [see step 5 at 903.29(c)(1)(v)]



# CapitalFundProgramFive-YearActionPlan

## PartI:Summary

HAName:						<input checked="" type="checkbox"/> Original	<input type="checkbox"/> RevisionNo: _____
PortageMetropolitanHousingAuthority							
Development Nmber/Name/Ha-Wide	Year1 FFY: 2003	WorkStatementforYear2 FFYGrant:2004 PHA FY:2004	WorkStatementforYear3 FFYGrant:2005 PHA FY:2005	WorkStatementforYear4 FFYGrant:2006 PHA FY:2006	WorkStatementforYear5 FFYGrant:2007 PHA FY:2007		
OH31-01AthenGardens		0.00	17,000.00	48,000.00	22,500.00		
OH31-01CommunityEstates		0.00	0.00	61,500.00	49,500.00		
OH31-02ScatteredSites		0.00	78,500.00	8,000.00	85,900.00		
OH31-03RavennaWoods		0.00	49,000.00	62,000.00	92,900.00		
OH31-04EastowneManor		0.00	17,000.00	0.00	7,500.00		
OH31-05TownSquareVillas	See	0.00	59,000.00	69,000.00	3,900.00		
OH31-06EtnaHouse		0.00	7,500.00	0.00	3,000.00		
OH31-09HeritageKnolls	Annual	0.00	99,000.00	2,000.00	9,700.00		
OH31-10RavennaScattered		0.00	0.00	41,000.00	2,000.00		
OH31-11WashingtonGroup	Statement	0.00	0.00	0.00	2,200.00		
OH31-15AcquisitionRehab		0.00	0.00	9,000.00	6,400.00		
CFPFundsListedfor5-Year Planning		568,404.00	568,404.00	568,404.00	568,404.00		
ReplacementHousingFactor Funds							
PHAWide-OperationsReseved Funds							



# Capital Fund Program Five-Year Action Plan

## Part II: Supporting Pages-Work Activities

Activitiesfor Year1  2003	Activitiesforyear:2 FFYGrant: 2004 PHAFY: 2004			ActivitiesforYear:3 FFYGrant: 2005 PHAFY: 2005		
	Development Number/Name	MajorWork Categories	EstimatedCost	Development Number/Name	MajorWorCategories	EstimatedCost
See Annual Statement	PHA-WideandOperations PHA-Wide-OperationsReservedFunds	OfficeAddition	247,263.00 321,141.00	PHA-WideandOperations		241,404.00
	OH31-01AthenaGardens		0.00	OH31-1AthenaGardens	PlaygroundEquipment	17,000.00
	OH31-01CommunityEstates		0.00	OH31-01CommunityEstates	PlaygroundEquipment	0.00
	OH31-02ScatteredSites		0.00	OH31-02ScatteredSites	Renovations/HVAC/ Electric/Carpet&Tile	78,500.00
	OH31-03RavennaWoods		0.00	OH31-03RavennaWoods	PlaygroundEquipment Counters/sinks/	49,000.00
	OH31-04EastowneManor		0.00	OH31-04EastowneManor	FrtDoor/IntercomeSyst Trashcompactor	17,000.00
	OH31-05TownSquareVillas		0.00	OH31-05TownSquareVillas	Counters/Sinks/Fixtrues Playgroundequip	59,000.00
	OH31-06EtnaHouse		0.00	OH31-06EtnaHouse	Intercomupgrade& HandrailsinHallway	7,500.00
	OH31-09HeritageKnolls		0.00	OH31-09HeritageKnolls	PlaygroundEquipment Conter/Sinks/Fixtures Windows	99,000.00
	OH31-10RavennaSingleHomes		0.00	OH31-10RavennaSingleHomes		0.00
	OH31-11WashingtonGroupHome		0.00	OH31-11WashingtonGroupHome		0.00
	OH31-15AcquisitionRehab.		0.00	OH31-15AcquisitionRehab.		0.00
	SubtotalofEstimatedCost			568,404.00	SubtotalofEstimatedCost	

# CapitalFundProgramFive-YearActionPlan

## PartII:SupportingPages-WorkActivities

Activitiesfor Year1	Activitiesforyear:4 FFYGrant:2006 PHAFY:2006			ActivitiesforYear:5 FFYGrant:2007 PHAFY:2007		
2003	Development Number/Name	MajorWrokCategory	EstimatedCost	DevelopmentNumber/Name	MajorWorkCategory	EstimatedCost
<b>See Annual Statement</b>	PHA-WideandOperations		267,904.00	PHA-WideandOperations		282,904.00
	OH31-01AthenaGardens	Kitchen/Bathcabinets countertops	48,000.00	OH31-1AthenaGardens	TubReplacement SmokeDetectors	22,500.00
	OH31-01CommunityEstates	UndergroundElect/ Fences/Patios/Kitchen &bathcabinets/Counters	61,500.00	OH31-01CommunityEstates	TubReplacements Fence(YardFencing SmokeDetectors	49,500.00
	OH31-02ScatteredSites	Renovations HVAC	8,000.00	OH31-02ScatteredSites	Renvoation/Roofs Gutters&Downs/Carpet	85,900.00
	OH31-03RavennaWoods	ExteriorPinting/Siding Gutters&Downs	62,000.00	OH31-03RavennaWoods	Wallcovering/furniture Windows/SmokeDet	92,900.00
	OH31-04EastowneManor		0.00	OH31-04EastowneManor	SmokeDetectors	7,500.00
	OH31-05TownSquareVillas	Wall/BathVanity/Sinks FixturesKit&BathCabinet	69,000.00	OH31-05TownSquareVillas	KitchenLights SmokeDete/Sitesign	3,900.00
	OH31-06EtnaHouse	Securitylights/sheddoors	0.00	OH31-06EtnaHouse	SmokeDetectors	3,000.00
	OH31-09HeritageKnolls	SecurityLights	2,000.00	OH31-09HeritageKnolls	ShedDoors&Thresh SmokeDet./Sitesign	9,700.00
	OH31-10RavennaSingleHomes	Roofs/Gutters/Downs Bathvanity/sink/cabinets	41,000.00	OH31-10RavennaSingleHomes	SmokeDetectors	2,000.00
	OH31-11WashingtonGroupHome	Tubs	0.00	OH31-11WashingtonGroupHome	SmokeDetectors	2,200.00
	OH31-15AcquisitionRehab.	Septics/WaterSofteners SecurityLights	9,000.00	OH31-15AcquisitionRehab.	SmokeDetectors Sitesign	6,400.00
	TotalforNon-DwellingEquipment:		0.00	TotalforNon-DwellingEquipment:		0.00
	TotalCFPEstimatedCost		568,404.00	TotalCFPEstimatedCost		568,404.00

**Five-Year Action Plan**  
**Part III: Supporting Pages**  
**Management Needs Work Statement(s)**  
**Capital Funding Program (CFP)**

**U.S. Department of Housing  
and Urban Development**  
Office of Public and Indian Housing

OMBApprovalNo.2577-0157  
(exp.7/31/98)

Work Statement for Year1 FFY: 2003	Work Statement for Year: 2 FFY: 2004			Work Statement for Year: 3 FFY: 2005		
	General Description of Major Work Categories	Quantity	Estimated Cost	General Description of Major Work Categories	Quantity	Estimated Cost
See Annual Statement	Resident Security		6,200.00	Resident Security		6,600.00
	Develop Resident Jobs Training Program		29,700.00	Develop Resident Jobs Training Program		62,700.00
	and Business Development Program		37,700.00	and Business Development Program		37,700.00
	Coordinator of Social Service for Drug Elimination			Coordinator of Social Service for Drug Elimination		
	Subtotal of Estimated Cost		73,600.00	Subtotal of Estimated Cost		107,000.00

## Five-Year Action Plan

### PartIII:SupportingPages

**ManagementNeedsWorkStatement(s)**

## CapitalFundingProgram(CFP)

**U.S.DepartmentofHousing**

Office of Public and Indian Housing

OMBApprovalNo.2577-0157

(exp.7/31/98)

Work Statement for Year1 FFY: 2003	Work Statement for Year: 4 FFY: 2006			Work Statement for Year: 5 FFY: 2007		
	General Description of Major Work Categories	Quantity	Estimated Cost	General Description of Major Work Categories	Quantity	Estimated Cost
See  Annual  Statement	Resident Security		6,600.00	Resident Security		6,600.00
	Develop Resident Jobs Training Program		63,700.00	Develop Resident Jobs Training Program		64,700.00
	and Business Development Program			and Business Development Program		
	Coordinator of Social Service for Drug Elimination		37,700.00	Coordinator of Social Service for Drug Elimination		37,700.00
	Subtotal of Estimated Cost		108,000.00	Subtotal of Estimated Cost		109,000.00

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary

<b>H A Name:</b> <b>Portage Metropolitan Housing Authority</b>		Grant Type and Number: OH12PO3150103 Capital Fund Program Grant No: 2003 Replacement Housing Factor Grant No: 2003	Federal FY of Grant: <b>2003</b>
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<input type="checkbox"/> Original Annual Statement	<input type="checkbox"/> Reserve for Disasters/Emergencies	<input type="checkbox"/> Revised Annual Statement/Revision Number
<input type="checkbox"/> Performance and Evaluation Report for Program Year Ending	<input type="checkbox"/> Final Performance and Evaluation Report	

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds	0.00	0.00	0.00	0.00
2	1406 Operations	51,757.00	0.00	0.00	0.00
3	1408 Management Improvements	113,000.00	0.00	0.00	0.00
4	1410 Administration	51,200.00	0.00	0.00	0.00
5	1411 Audit	1,500.00	0.00	0.00	0.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	7,000.00	0.00	0.00	0.00
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	0.00	0.00	0.00	0.00
10	1460 Dwelling Structures	312,400.00	0.00	0.00	0.00
11	1465.1 Dwelling Equipment-Nonexpendable	0.00	0.00	0.00	0.00
12	1470 Nondwelling Structures	9,000.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	15,000.00	0.00	0.00	0.00
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	0.00	0.00	0.00	0.00
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1499 Development Activities	0.00	0.00	0.00	0.00
19	1501 Collateralization or Debt Service	0.00	0.00	0.00	0.00
20	1502 Contingency	7,547.00	0.00	0.00	0.00
21	<b>Amount of Annual Grant (Sum of Lines 2-20)</b>	<b>568,404.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
22	Amount of line 21 Related to LBP Activities	0.00	0.00	0.00	0.00
23	Amount of line 21 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
24	Amount of line 21 Related to Security-Soft Costs	6,200.00	0.00	0.00	0.00
25	Amount of line 21 Related to Security-Hard Costs	0.00	0.00	0.00	0.00
26	Amount of line 21 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part II: Supporting Pages**

PHAName:		Grant Type and Number: OH12PO3150103				Federal FY of Grant: 2003		
Portage Metropolitan Housing Authority		Capital Fund Program Grant No: 2003				Replacement Housing Factor Grant No: 2003		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No. Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
HA-Wide	<b>Operations</b>	<b>1406</b>		51,757.00	0.00	0.00	0.00	
HA-Wide	<b>Management Improvements</b>	<b>1408</b>						
	Resident Security			6,200.00	0.00			
	Develop Job Training & Business			69,100.00	0.00			
	Develop Programs			37,700.00	0.00			
	Coordinator of Social Services for Drug Elimination							
	Total for Management Improvements			113,000.00	0.00	0.00	0.00	
HA-Wide	<b>Administration</b>	<b>1410</b>						
	a. Salaries	1410.1		36,050.00	0.00			
	b. Fringe Benefits	1410.9		14,050.00	0.00			
	c. Advertising	1410.19		1,100.00	0.00			
	Total for Administration			51,200.00	0.00	0.00	0.00	
HA-Wide	<b>Fees &amp; Costs</b>	<b>1430</b>						
	a. Architect			7,000.00	0.00			
	Total for Fees & Costs			7,000.00	0.00	0.00	0.00	
HA-Wide	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide	<b>Nondwelling Equipment</b>	<b>1475</b>						
	a. Office Equipment			15,000.00	0.00			
	Total for Nondwelling Equipment			15,000.00	0.00	0.00	0.00	
HA-Wide	<b>Relocation Cost</b>	<b>1495.1</b>		0.00	0.00	0.00	0.00	
HA-Wide	<b>Contingency</b>	<b>1502</b>		7,547.00	0.00	0.00	0.00	

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part II: Supporting Pages**

PH Name: Portage Metropolitan Housing Authority		Grant Type and Number: OH12PO3150103 Capital Fund Program Grant No: 2003 Replacement Housing Factor Grant No: 2003				Federal FY of Grant: 2003		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised	Funds Obligated	Funds Expended	
	Total for Site Improvement	1450		0.00	0.00	0.00	0.00	
OH31-01 Athena Gardens	Replace flooring Replace Interior Doors Replace Interior Trim	1460		50,000.00 26,250.00 9,000.00	0.00			
OH31-01 Community Estates	Replace flooring replace Interior doors Replace Interior trim		174 6525 LF	68,000.00 30,450.00 10,000.00	0.00 0.00 0.00			
OH31-02 Scattered Sites	1339 Franklin Ave. Install Carpet LVRm, Dining & Hall 9876 & 9899 Blanton Dr. Replace closet doors All Scattered Sites Replace Kitchen Appliances 227 S. Walnut St. Replace Kitchen Cabinets, sinks & faucets		9 23 All	1,200.00 2,500.00 20,000.00 12,000.00	0.00			
31-04 Eastowne Manor	Replace Lobby & Patio Furniture		As Needed	12,000.00				
31-6 Etna House	Replace Lobby Furniture Install Wall Coverings Install Mini Blinds in Lobby & Units		As Needed 85	3,000.00 35,000.00 15,000.00				
31-11 Washington Group Home	Rehab Kitchen for ADA			18,000.00				
	Total for Dwelling Structures			312,400.00	0.00	0.00	0.00	
		1465						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
OH31-02 Scattered Sites	4325, 4327, 4333, 4399 Marks Ave. Replace Sheds	1470		4,000.00				
OH31-04 Eastowne Manor	Replace Shed			5,000.00 9,000.00	0.00	0.00	0.00	
	Total for Nondwelling Structures							
	Total for Nondwelling Equipment			9,000.00	0.00	0.00	0.00	

# AnnualStatement/PerformanceandEvaluationReport

## CapitalFundProgramandCapitalFundProgramReplacementHousingFactor(CFP/CFPRHG)PartIII:ImplementationSchedule

Development Number/Name HA-Wide Activities	AllFundsObligated(QuarterEndingDate)			AllFundsExpended(QuarterEndingDate)			ReasonsforRevisedTargetDates(2)
	Original	Revised(1)	Actual(2)	Original	Revised(1)	Actual(2)	
OH31-01 AthenaGardens	09/30/03			03/30/04			
OH31-01 Community Estates	09/30/03			03/30/04			
Oh31-02 ScatteredSites	06/30/03			03/30/04			
OH31-04 EastowneManor	09/30/03			03/30/04			
OH31-06 EtnaHouse	06/30/03			03/30/04			
OH31-11 Washington GroupHome	06/30/03			03/30/04			
HA-Wide Physical Improvements	12/31/03			12/31/04			
HA-Wide Mgmt.Impr.	12/31/03			12/31/04			
Administration	12/31/03			12/31/04			
Fees&Costs	12/31/03			12/31/04			
Contingency	12/31/200			12/31/04			



**AttachmentC**  
**ProgressinMeeting5YearPlanMissionandGoals**  
**Year2002Accomplishments**

1. Efficiently, effectively operate agency housing programs, while being sensitive to the needs and concerns of participants, landlords, and the community.
  - A. Ensure efficient, effective, responsive Section 8 administration
    1. Achieve SEMAP High Performer status
      - a. Conduct semi -annual internal compliance reviews  
*Reviews were conducted in January 2002 and in June 2002.*
      - b. Convert MTW voucher to new 50058 format  
*Staff began converting to the MTW 50058 in May 2002. All new admissions are placed in the MTW 50058. Current program participants are transferred to the MTW 50058 at the time of recertification (either interim or annual, whichever comes first). This will be an ongoing process until all existing program participants have been converted (May 2003).*
      - c. Train staff and convert to new Windows -based computer programs  
*On-site training was conducted by Management Computer Systems in April 2002. Several additional training sessions were held to ensure Section 8 staff was properly instructed on the use of the new system.*
    2. Maximize the effectiveness of the program for applicants and participants
      - a. Gather and analyze data identifying difficulties applicants have in searching for housing  
*This is an ongoing task. Staff review information contained on the landlord contact sheet in an attempt to determine difficulties applicants have. The Section 8 Briefing session addresses some of the pitfalls and offers suggestions to applicants aimed at helping them find a unit.*
      - b. Continue to refine and market homeownership provisions of Portage HOPES  
*From January through August 2002, 9 families have purchased homes through the homeownership program. An additional 16 families are in various stages of the homeownership process (initial screening, counseling, homebuyer education courses, financing, searching for a home, etc.) In addition to direct mailing to program participants regarding the program and homeownership orientation sessions, articles were placed in the tenant newsletter throughout 2002.*
      - c. Target zero income participants for integrity checks and referrals  
*Applicants must document that they or she has had a source of income within the last 60 days. Lack of an income delays further processing of the application. Staff verifies with the Portage County Department of Job & Family Services that families claiming zero income are not receiving any public assistance. Families reporting zero income must complete written certification every 60 days.*
      - d. Implement Portage HOPES mandatory rent feature once MCS computer system has been upgraded  
*This feature has not been implemented due to computer system deficiencies. Discussions with MCS have been ongoing. Once system is programmed to accept mandatory rent feature, staff will begin implementation.*

- e. Implement new Lead Based Paint regulations and provide ongoing LBP information to landlords  
*Information on LBP regulations were provided to landlords several times during the course of 2002. This information included articles in issues of the PMHA landlord newsletter and brochures on lead -based paint workshop held by other parties.*
  - f. Increase use of FSS program to 90%  
*FSS utilization rate has been in excess of 90% since February of 2002. The current utilization rate for the FSS program is 111%.*
3. Maximize efficiency of the program
- a. Develop marketing materials and orientations for FSS to recruit more participants for FSS and home ownership program  
*FSS Coordinator updated marketing materials that were used for the FSS program and the home ownership program. As the FSS utilization rate is in excess of 100%, marketing is currently done on a limited basis.*
  - b. Redesign briefing sessions to provide more clarity, including the use of technological aids in presentation  
*With the assistance of Price Waterhouse Coopers, the Section 8 briefing presentation was revised. Session now consists of a PowerPoint presentation and an updated guidebook for participants.*
  - c. Refine the practice of accepting Kent City housing code inspections in lieu of performing HQS recertification inspections for 50% of Kent units covered by the Kent Housing Code  
*Staff fine -tuned the manner in which this feature was implemented. This resulted in greater efficiency.*
  - d. Consolidate scheduling of HQS inspections at large complexes  
*This feature has not been implemented, due to concern expressed by owners. This HOPE S feature will be analyzed further.*
  - e. Conduct written survey of program participants to obtain feedback on policies and their effectiveness  
*A survey will be mailed out with the November 2002 tenant newsletter.*
4. Continue recruitment of new landlords
- a. Hold periodic seminar to inform potential landlords  
*Staff plan to hold a workshop sometime between November of 2002 and February 2003*

## B . Ensure efficient, effective, responsive public housing administration

- 1. Maintain PHA S High Performer status
  - a. Conduct quarterly site inspections of multi -family sites and address PHA S and preventative needs as soon as identified  
*Quarterly inspections have been undertaken throughout the year.*
- 2. Maximize the efficiency and effectiveness of housing management
- b. Offer more housing options to childless sole remaining family members and reduce by 50% the number of occupants residing in public housing units having multiple bedrooms

Since 2001 PMHA has notified eight families of housing options due to their sole remaining family member status and 5 vouchers were issued. The current status of these eight families are as follows:

us of

- 1 tenant vacated prior to the issuance of a voucher
- 1 tenant passed away prior to the issuance of a voucher
- 3 tenants were housed under the voucher program
- 1 tenant is on the waiting list for S      paulding
- 1 tenant's family composition changed so the matter was resolved
- 1 tenant is actively looking for a unit under the voucher program

b. Implement minimum security deposit policy for new admissions and transfers  
This feature of the MTW has not      been implemented due to interest calculations and complications of the process

c. Develop and implement new rent calculation policy

A new rent calculation policy has not been developed. Further consideration      , discussion and input will be undertaken.

d. Develop and implement new rent collection policy

This has been completed and collection rates have improved.

e. Develop and implement stronger housekeeping policy

A stronger housekeeping policy was developed and implemented and assisted in the Public Housing staff to determine more easily the overall condition of the unit, however, this policy needs revised. During the implementation and follow      -up of inspections, it became apparent the policy and procedures were making it more difficult for lease enforcement and eviction, if necessary. It also failed to define actual follow      -up procedures. Finally, the new policies and procedures were not clearly relayed to residents prior to implementation causing the results of re-inspections and follow      -up to be ineffective.

f. Develop and implement strategies for improved lease enforcement

Strategies for Lease enforcement were implemented during 2002 particularly because of the Site Manager position. Because of this position, PH staff was able to obtain more information from residents and law enforcement offices and were able to document and evict if necessary

g. Develop vehicle registrations system and database

A vehicle registrations system and database has not yet been implemented.

h. Develop improved parking and towing procedures

Improved parking and towing procedures have been developed and utilized and have been successful due to the Site Manager position.

i. Improve communications with Maintenance Department

Communication with the maintenance dept. has improved in regard to vacancy issues due to weekly meeting taking place.

### 3. Maximize the efficiency of maintenance

a. Improve customer service perspective

Stressed at maintenance meetings that PMHA employees are to serve our clients.

A Performance Ratings survey is attached to all work orders for the resident to complete and return.

b. Maintain PHA's physical inspections score of at least 90%

The latest physical inspections score was 92%.

c. Reduce vacancy turnaround time to an average of 10 days

The most recent vacancy report printout reflected a      vacancy turnaround time average of 10 days.

d. Establish system and implement barcoding system for maintenance inventory control

*This objective was delayed until computer system was converted to a windows operating system. Fixed assets are now on the system and they will have barcodes by the end of September. The barcoding of the maintenance materials inventory is December 31<sup>st</sup>.*

f. Establish written definition of emergencies requiring attention for use in guiding staff responding to after hours calls

*An Emergency Response Procedure was written detailing definition of emergencies and procedures for responding to all situations. The document is being reviewed by others presently.*

2. Respond to local housing needs by developing new affordable housing opportunities for low income households and improving resource utilization. -

A. Develop affordable housing using HUD and non-HUD sources

1. Expand the supply of permanent, affordable housing, for the low to-moderate income population in a variety of geographic areas.

a. Retain services of a housing developer as an employee or through a contractual relationship

*Chosen to implement and instead relying on in-house and local expertise until a viable development opportunity arises*

b. Analyze opportunities for acquisition or new construction that come to the attention of PMHA

*Analyzed two opportunities, one for acquisition and one for maintenance contract*

c. Keep up-to-date on financing resources, particularly loans/grants offered by Ohio Dept. of Development and Low-Income Tax Credit Program

*Met with Cleveland HUD Multi-family staff to discuss financing possibilities for acquisition of 236 property*

2. Preserve the inventory of permanent, affordable rental housing for the general low-income population

a. Monitor HUD contracts with private owners that are expiring, and keep in contact with owners about future plans

*Worked with three owners regarding future plans for their properties*

b. Administer new Section 8 vouchers received to support private project-based subsidized properties having pre-paid HUD mortgages

*No new HUD contracts have been issued to the PMHA thus far in 2002*

3. Support the development of affordable housing with supportive services for special needs populations.

a. Meet with local service providers to identify housing needs of disabled population

*Section 8 Manager established on-going committee representing populations having disabilities in conjunction with the Mainstream Section 8 program*

B. Use Public Housing and Section 8 resources to meet identified housing needs

1. Monitor Tenant Preference Policy to meet identified housing needs
  - a. Work with local social service agencies to refine tenant selection preferences to meet local needs as well as maximizing utilization  
*Discussions have taken place and will continue to do so on an on-going basis*
2. Identify alternative uses for developments having marketing issues
  - a. Form task force to study best occupancy use for Etna House.  
*Has not yet been implemented*
  - b. Monitor financial position of Community Estates following winter use of heat conversion from electricity to gas  
*A year-end financial profile was developed for each public housing site*
3. Use Section 8 resources to assist housing owned by non-profit
  - a. Establish Section 8 project-based program for non-profit owners serving special needs clients  
*A Request for Proposals was developed and distributed. The implementation of the program is underway.*

### 3. Enhance the quality of life of the PMHA's residents, with particular emphasis upon promotion of family self-sufficiency.

A. Increase self-sufficiency rate in public housing

1. Ensure policies encourage family responsibility
  - a. Implement Portage HOPE Sch changes, including mandatory rent and minimum income  
*Implementation and refinements continued.*
2. Encourage on-site supportive services
  - a. Continue to support non-profit partners providing supportive services to public housing residents  
*Relationship with PATH continued. In addition, new services were initiated, such as summer lunch program for children, computer classes, and formation of a Campfire Girls and Boys club.*
  - b. Convert an apartment at multi-family site to use as community space as on-site supportive services become available  
*No additional site was needed during 2002, as new support services were developed on an on-going basis.*
3. Use housing as an incentive for self-sufficiency progress
  - a. Implement STEP Section 8 features of Portage HOPE  
*This feature was not implemented due to tight budget of Section 8 program.*
  - b. Coordinate with Portage Area Development Corp. and Neighbor Works to expand the Section 8 homeownership program  
*At least 9 Section 8 participants became homeowners under this partnership during 2002.*
4. Seek out and pursue appropriate grant opportunities
  - a. Seek funding for self-sufficiency activities for PMHA participants

*Initiated efforts to seek designation as a Weed and Seed site for the McElrath neighborhood.*

- b. Seek new partnerships with local agencies agreeing to offer services to PMHA participants  
*Expanded PAD Corp. home ownership program to include public housing families.*
- c. Seek out grants for playground equipment  
*Grant applications were submitted to the Tiger Woods Foundation and Newman's Own.*

B. Increase employment rate of Section 8 and public housing families.

- 1. Provide incentives for tenants to generate higher income
  - a. Monitor impact of new ceiling rents in public housing  
*Analysis is not complete, but will be by the last quarter of the year*
  - b. Continue working with social service agencies to target services to PMHA participants having zero incomes  
*Efforts are being made with PATH participants, but cooperative efforts with agencies need to be expanded through greater initiative by PMHA*
- 2. Provide job training and work through PMHA maintenance/construction needs
  - a. Continue the maintenance/construction job training program by implementing the second year of the ROSS (Resident Opportunities for Self-Sufficiency) grant  
*Program implementation has successfully continued, and has produced a whole level of job trainees who are performing maintenance and construction work*
  - b. Implement the computer training component of the ROSS grant  
*Classes have been provided by Maplewood Career Center instructors*

## **AttachmentD ResidentAdvisoryBoardComments**

### **June17,2002**

The first meeting of the Portage Metropolitan Housing Authority (PMHA) Participant Advisory Committee (PAC) began 5:30 P.M. on Monday, June 17, 2002 at the PMHA Office (2832 State Route 59, Raven na). Representing the PMHA was Romaine Chritton, Public Housing HOPES Coordinator. Resident participants were:

<b>Section8:</b>	JuanitaBurrow	
<b>TownsquareVillas:</b>	PatDorian	TracyPetitt

An agenda, Public Housing Agency Plan Overview, and NOTICE PIH 2001 (HA) were mailed May 31, 2002, to those residents who specifically volunteered to serve on the PAC in response to newsletter outreach efforts; recruitment efforts during resident meetings; and Section 8 mailings. In addition, a flyer indicating meeting date/time and the agenda was posted on a bulletin board in the PMHA lobby. The flyer extended an invitation for participation to public housing residents and Section 8 tenants. Agenda items included: -3

- I. Overview of the PMHA Planning Process
- II. Resident Participation Funds
- III. Other Items as Determined by Committee Members
- IV. Adjournment

Ms. Chritton reviewed the Public Housing Agency (PHA) Plan Overview with those in attendance. A copy of the PMHA 2001 Agency Plan was available to demonstrate the scope of the final product.

### **Comments about Resident Participation Funds**

NOTICE PIH 2001 -3 pertaining to the distribution and use of operating subsidy funds received for Resident Participation Activities was discussed. Residents felt that HUD guidance was limited, and the use of funds restrictive. However, all three members in attendance agreed that a \$10 stipend should be provided to PAC members for each meeting they attend. They pointed out that rising gasoline costs might impact attendance. Also, they felt that a stipend would help with childcare costs that some residents incur to attend PAC meetings. No further ideas were forthcoming.

### **Other Items**

- The Section 8 resident stated that her landlord is negligent in making repairs to her dwelling. She said that leaks and holes exist. However, an annual inspection is scheduled within the next three weeks. Discussion concerning interim inspections followed.

- The two Townsquare residents recommended that new kitchen long florescent lights be installed, because the kitchens are dark and inadequately lit. They also requested new carpeting, windows in bathrooms, and dishwashers.
- The only recommendation for increasing the perception of safety among residents at Townsquare was the installation of new locks on the front doors. Both residents felt that having a two -lock system (instead of one) would deter crime.
- A recommendation to implement a Family Self -Sufficiency Program for public housing residents was made. A discussion followed concerning the Moving-To-Work feature that allows public housing residents to transfer to Section 8 in order to participate in the FSS program for homeownership, etc. However, both public housing residents stated they experienced difficulty in locating landlords that would accept vouchers. Thus, they opted for public housing.
- One public housing resident felt that on -going rental increases due to income increases serve as a deterrent to promoting self -sufficiency. She indicated that such rental increases cause residents to question the rewards they reap from employment. A discussion followed concerning the numerous residents that voluntarily left public housing after attaining an income that sustained self -sufficiency. The merits of adopting a rental schedule will be discussed at future meetings.
- Committee members felt that the current PMHA job -training program did not offer enough latitude for career choices. A discussion followed concerning the benefits of allowing residents to pursue more in -depth training at vocational institutions, etc. to meet trades certifications for heating/air conditioning, electrical, etc. Ms. Chritton elaborated on the options currently available to participants under Level II of the training program, which allows for concentrated efforts to meet career goals. She also explained that scholarships would be awarded to residents under the ROSS 2002 program, should it be funded. Ms. Chritton will explore redesigning the current flyers used for recruitment.
- One resident felt that residents should be allowed to have cats and dogs providing that they are neutered and the residents can pass unscheduled housekeeping inspections. Ms. Chritton explained that the current PMHA Pet Policy under MTW allows such pets at scattered housing sites, which serve as rewards for residents who demonstrate economic stability.

A suggestion was made to conduct the next PAC meeting at 6:30 P.M. to allow working residents more time to attend. The meeting was adjourned at 6:30 P.M.



### July 15, 2002

The second meeting of the PMHA Participant Advisory Committee began 6:30 P.M. on Monday, July 15, 2002 at Community Estates (6469 South Fairfield, Ravenna). Representing the PMHA was Romaine Chritton, Public Housing HOPES Coordinator; Anna Doty, Project Manager; Becky Rankin, Maintenance Assistant; and Cindy Blevins, Public Housing Manager. Resident participants were:

<b>Community Estates:</b>	Sonja DeBolt	Joe (Norman) Yafanaro
	Judith Nicholas	Sandra Just

An agenda and information about HUD's Resident Service and Satisfaction Survey were mailed to PAC members July 1, 2002. Meeting notice, agenda, and HUD Survey information were also included in the PMHA June newsletter and posted at each public housing site and in the PMHA lobby. Agenda items included:

- I. HUD's Resident Service and Satisfaction Survey
- II. Resident Participation Funds
- III. Maintenance, Housing and Safety Concerns
- IV. Section 3 and Job Training Opportunities
- V. Other Items as Determined by Committee Members
- VI. Adjournment

### HUD's Resident Service and Satisfaction Survey

Ms. Chritton presented information about the HUD Survey and urged residents to complete the survey if selected to do so. She also passed out a copy of the actual survey tool for the PAC to review and encouraged those present to share information about the survey with their neighbors.

### Comments About Maintenance Concerns

Ms. Rankin encouraged dialogue regarding maintenance issues. A concern about door locks was voiced, however, Ms. Rankin said that a new door frame should fix the problem of locks not properly working. Doors and frames are currently being installed at Community Estates.

A great deal of concern was expressed regarding a rock pile near the playground area. A contractor who is building a bank to halt erosion delivered the rocks for this project. Residents recommended that the contractor use, at minimum, snow fencing instead of yellow tape to reduce the chance of injury to children. PMHA staff encouraged residents to call the office and inform maintenance directly. PMHA staff will also bring this matter to the attention of the Assistant Director.

Residents were supportive of plans for new fencing at Community Estates and design ideas were discussed.

### Comments Regarding Housing and Safety Concerns

Community Estates residents commented that they would like the Officers from the Sheriff's Office to be more visible in their neighborhood. They would like to see more casual interaction between the officers and residents.

Residents did not feel that other residents posed problems at Community Estates, but they did express concern about the on-going activity at the corner store. Residents said that there are many cars and people loitering around the store, and they use Community Estates roads to turn around and drop off persons who are not residents. The dropped off persons then walk from the development to the hill in back of the store. Also, persons from the store drive to Community Estates and park for 5 to 10 minutes, and then they leave.

Residents find these behaviors to be frightening. Most of this activity takes place between 6:00 P.M. and 3:00 A.M. They commented on the difficulty of noting license plate numbers due to darkness and timing.

One resident recommended a "No Turnaround Allowed" sign be installed at the entrance.

### Other concerns/recommendations expressed included:

- Children take other children's bikes and toys from their fenced areas without permission.
- One resident said his car appeared to be purposely scratched and dented on several occasions.
- Kids are out late at night and unsupervised.
- Youths are also unsupervised.
- A recommendation was made to inform parents the necessity of supervising their children.
- Neighborhood Crime Watch is in place, however, meetings have been suspended due to discord among members.
- One resident said she would like to see the residents communicate more often.

### Section 3

Ms. Doty provided an overview of Section 3 and encouraged participation.

### Capital Funds

Ms. Doty explained the Capital Fund Program and reviewed proposed expenditures for 2003. Residents were supportive of replacing flooring, interior doors and trim at Community Estates. Doty said resident input for the upcoming fence replacement and other projects is desired and welcomed.

### Training Opportunities

Ms. Chritton provided an overview and encouraged input/ feedback concerning PMHA training opportunities. One resident completed computer training and was

very positive about the experience. There appears to be interest and support for conducting the next computer training class at Community Estates.

Transportation problems appeared to be a barrier to participation in the PMHA Jobs Training Program for building maintenance and industrial trades. Chritton encouraged residents to contact her before deciding regarding participation.

#### Resident Participation Funds

Chritton provided an overview of Resident Participation Funds and passed out a copy of the legislation. She encouraged suggestions for using funds. One suggestion was moving the existing bulletin boards near the mailboxes and building roofed posts for mounting. Staff and residents felt that the current location of the bulletin board is not in the typical flow of resident traffic. Thus, information is not being read.

The meeting was adjourned at 8:00 P.M.

#### August 12, 2002

The third meeting of the PMHA Participant Advisory Committee began 6:05 P.M. on Monday, August 12, 2002 at the PMHA Office, 2832 Route 59, Ravenna. Representing the PMHA was Anna Doty, Project Manager, and Romaine Chritton, Public Housing HOPE S Coordinator. Resident Participant was Roxanne Anderson, Section 8. Agenda included:

- I. Resident Participation Funds
- II. Section 3 and Job Training Opportunities
- III. Capital Funds
- IV. Other Items as Determined by Committee Members
- V. Adjournment

Because attendance of Committee Members was limited to one, the meeting was conducted informally. Ms. Anderson proposed the following:

- Section 8 tenants should have the opportunity to evaluate their landlords so feedback could be compiled and reviewed by potential tenants. Thus, Section 8 voucher holders may determine before renting a dwelling if the landlord's policies are compatible with their expectations.
- Monthly payments for college loans should be considered for rent calculation since they may pose a hardship.

Ms. Anderson also felt that training programs conducted during standard hours and weekdays are most convenient for participants, because finding babysitters for evening and weekend commitments can be difficult.

The meeting was adjourned at 6:45 P.M.

**September 16, 2002**

The fourth meeting of the PMHA Participant Advisory Committee was scheduled to begin at 5:30 P.M. at the PMHA Office, 2832 State Route 59, Ravenna. However, no public housing residents or Section 8 tenants arrived for the meeting. Romaine Chritton was available to represent the PMHA.

**October 15, 2002 Public Hearing**

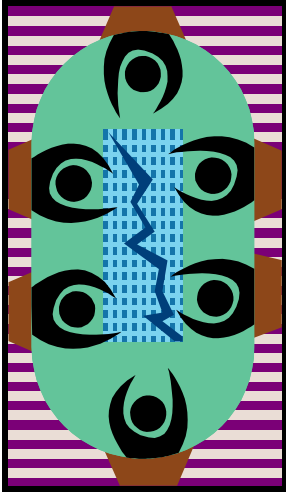
Christie Anderson, Executive Director

No members of the public attended the public hearing held at 5:00 p.m. at the PMHA office. Ms. Anderson was prepared to review the Agency Plan and highlight the following areas: 2003 strategy, tenant selection preferences, capital improvements plan, MTW rent policy and occupancy change, and financial resources. Full copies of the attachment were also available to be reviewed.

Prior to the public hearing, Mark Frisone, Director of Family and Community Services of Portage County, contacted Ms. Anderson by phone to share thoughts on the Agency Plan, as he indicated his inability to attend the public hearing. Mr. Frisone wanted to discuss two issues. First, he inquired about the number of homeless households given a preference last year, and the number that would be accepted under the proposed change. Ms. Anderson explained that the homeless and disabled preferences would be reduced by about half. She noted that this is in response to the fact that almost all households assisted under the Section 8 program in 2002 have been given immediate assistance, ahead of the top names on the waiting list. Waiting list families have not been contacted since March 2002. Mr. Frisone stated his understanding of the need for the change and thanked the PMHA for being sensitive to the needs of the homeless by retaining the preference.

Mr. Frisone expressed his support for the use of 213 S. Willow, Kent for short term transitional housing. He stated that this would help alleviate some of the pressure felt by the homeless shelter, in response to the proposed change in the homeless preference. Mr. Frisone stated that his Board agreed to the rental terms and occupancy requirements, and that Family and Community Services supported the PMHA's effort to gain approval for this change in occupancy.





## PMHA Resident Participant Advisory Committee 2002

### **Section 8**

Roxanne Anderson  
1050 Camela St. NW  
Hartville, Ohio 44632  
330/877-8991

Juanita R. Burrow  
9038 East Maple Grove Road  
Windham, Ohio 44240  
330/326 -2695

### **Community Estates**

James T. Brewer Sr.  
6492 South Fairfield St.  
Ravenna, OH 44266  
330/297-6982

Sonja DeBolt  
6454 South Fairfield St.  
Ravenna, OH 44266  
330/297-6337

Judith Nicholas  
6473 South Fairfield St.  
Ravenna, OH 44266  
330/296-2682 (message)

Joe (Norman) Yafanaro  
6475 South Fairfield St.  
Ravenna, OH, 44266

Sandra Just  
6468 South Fairfield St.  
Ravenna, OH 44266  
330/298-9355

### **Renaissance Place**

Jeanette Walker  
5650 South Prospect St. #110  
Ravenna, OH 44266  
330/296-8100

Shelley Furr  
5650 South Prospect St. #206  
Ravenna, OH 44266  
330/297-8941

### **Harvest Drive**

Vera Mays  
637 Harvest Drive  
Ravenna, OH 44266  
330/298-0266

### **Townsquare Villas**

Tracy Petitt  
1352 Townsquare Drive #1  
Kent, OH 44240  
330/678-5627

Pat Dorian  
1352 #2 Town Square Drive  
Kent, Ohio 44240

### **Athena Gardens**

Jaimie Bell  
1673 Athena Drive  
Kent, OH 44240  
330/673-9007



**Attachment F**  
**Resident Member on the PHA Governing Board**

1. ☒ Yes   ☐ No:      Does the PHA governing board include at least one member who is directly assisted by the PHA this year? (if no, skip to #2)

A. Name of resident member(s) on the governing board:

Teresa Carr

B. How was the resident board member selected: (select one)?

☐ Elected

☒ Appointed

C. The term of appointment is (include the date term expires):      October 31, 2006

D.

2. A. If the PHA governing board does not have at least one member who is directly assisted by the PHA, why not?

☐

the PHA is located in a State that requires the members of a governing board to be salaried and serve on a full time basis

☐

the PHA has less than 300 public housing units, has provided reasonable notice to the resident advisory board of the opportunity to serve on the governing board, and has not been notified by any resident of their interest to participate in the Board.

☐

Other (explain):

B. Date of next term expiration of a governing board member:

October 31, 200 2

C. Name and title of appointing official(s) for governing board (indicate appointing official for the next position):

Lewis Steinbrecher, Kent City Manager

Kent City Hall

319 S. Water St.

Kent, OH 44240



## **AttachmentG**

### **RESIDENTSATISFACTIONSURVEY FOLLOW-UPPLAN**

#### **Communication**

EffortswillbemadetoincreasethewrittencommunicationbetweenthePMHA staffandresidents. Specificactivitiestobeimplementedinclude:

- Continuetopublishacalendarin theNewsthereverymonthlisting residentactivities,suchasResidentSiteMeetings,Participantadvisory Committeemeetings,FlowerVoucherProgramandResidentCouncil meetings
- Continuetoconductwrittensurveysofresidentstoinformresidentsof he residentactivitymonies,andtoseekguidanceontheexpenditureofthese funds.
- PublisharticlesinthenewsletterabouttheactivitiesoftheResident Councilstoencourageresidentstoparticipateandencouragethe formationofmorecouncils.
- Prepareanddistributebinderstonewresidentscontaininginformation aboutthePMHA,includingtrainingopportunities,communityresources, andPMHAAnnualPlangoalsandobjectives.

StaffwillhelprevivethetwopreviouslyexistingResidentCouncils,Etna House andCommunityEstates.

#### **Safety**

ThePMHAemployed aSiteManager,whoseresponsibilityincludesinteracting withresidentsaboutsafetyproblemsandconcernsaboutcrime.Residentswere respondingfavorablytothepresenceofthisindividualonsite. However,the employeehasdeparted,andthePMHAisworkingtofilltheposition.Asthe DrugEliminationGrantfundingforthispositionwillbedepletedduring2003,the PMHAisresearchingotherfundingsources tofillthisvoid.

Blank surveys containing questions about crime and safety will be mailed to each resident with the rent statement periodically, to obtain feedback from residents on an on-going basis. This feedback will reveal problematic trends as they become evident, so that they can be addressed at an earlier stage.

Residents have expressed concern with limited exterior lighting at several family developments. Using 2001 PHDEP funds, exterior light fixtures were recently replaced at two sites, and should help alleviate residents' safety fears.

The PMHA is applying for Weed & Seed recognition of the neighborhood adjacent to Community Estates. This neighborhood is known to be a hub of drug dealing in Portage County.

### **Neighborhood Appearance**

By implementing quarterly inspections of the sites by both maintenance and management staff, it will be possible to more closely monitor the actions of residents and the performance of maintenance staff, with regard to the accumulation of trash and litter.

Maintenance supervisors will begin random monitoring of the quality and thoroughness of work performed by maintenance staff, particularly the upkeep of common areas. Currently, the completion of the work is tracked, but the quality of work is not routinely monitored.

Residents' concern with the playgrounds at the family sites is related to the fact that some playground equipment was eliminated this summer due to the potential for safety hazards. Since the RASS survey was conducted, the playground equipment has been replaced. In addition, the HOPE S Coordinator for Public Housing is also researching foundation and grant opportunities in an effort to expand the amount of playground equipment available, and has applied for funds through Newman's Own and is preparing an application to the Tiger Woods Foundation.

## Attachment H

### Component 10(B) Voluntary Conversion Initial Assessments

- a. How many of the PHA's developments are subject to the Required Initial Assessments? 7
- b. How many of the PHA's developments are not subject to the Required Initial Assessments based on exemptions (e.g., elderly and/or disabled developments not general occupancy projects)? 3
- c. How many Assessments were conducted for the PHA's covered developments? 5 multi-family general occupancy and 2 elderly
- d. Identify PHA developments that may be appropriate for conversion based on the Required Initial Assessments:

Development Name	Number of Units
N/A	

- e. If the PHA has not completed the Required Initial Assessments, describe the status of these assessments. Assessments have not yet been completed for the 2 scattered site developments, as an attempt is being made to identify the projects' expenses by individual property.

### Summary of Initial Assessment

An analysis of the costs incurred by HUD in operating the PMHA's Section 8 program compared to the public housing program was conducted, based on PMHA's actual costs for year 2000. At present, the analysis has been prepared for all of the PMHA's multi-family developments, including the senior buildings, but has not been completed for the individual scattered site properties.

The PUM cost of operating a public housing multi-family unit in 2000 was \$425. The cost incurred by PMHA in operating the Section 8 program was \$420 PUM. Although the costs incurred are similar for both programs, HUD invests much more per unit funding into the Section 8 program.

In terms of program revenues, the PMHA received \$308 PUM for public housing in 2000 and \$432 for each Section 8 unit. This subsidy difference is attributable to the fact that public housing operating costs are offset in part by tenant rents. On the other hand, in the Section 8 program, HUD covers all \$420 in costs, as the tenant rents benefit the landlord, and do not offset program costs such as is the case with public housing rents. A conversion of all family multi-family developments to Section 8 assistance would cost

HUD at least an additional \$260,400 annually. Therefore, in terms of conserving government funds, it is more appropriate to retain PMHA's 305 housing units under the public housing program.

Two of PMHA's public housing developments have historically incurred a financial loss, and pose a drain on the PMHA's public housing program. When applying Section 8 rent to each public housing development, based on Section 8 rent reasonableness standards, these two developments would fare better financially with subsidies funded by the Section 8 program. However, besides the fact that a conversion to vouchers would increase HUD's cost, Section 8 assistance would be risky for these properties, as they both suffer from marketing problems. As stated in the PMHA's initial Moving To Work application, the future use and ownership of these properties require further study, as a Section 8 conversion is not the most desirable alternative.

At this time, the PMHA has determined that a voluntary conversion of its multi-family public housing stock to vouchers is inappropriate, as removal of the multi-family developments would not meet the necessary conditions for voluntary conversion.

**AttachmentI**

**MovingToWorkAmendment**  
**Adding213S.WillowSt.,Kent,toMTWSupportiveServicesHousing**

The March 15, 1999 Moving To Work Demonstration Agreement between the PMHA and HUD authorizes the provision of targeted services at particular public housing sites. The requirements are stated on the first page of the Appendix, under Section 2 Plan Elements,

A. Occupancy Policies

1. Public Housing Unit Designation Policy for Family Housing

a. Supportive Services Housing

The last paragraph of this section states, "The PMHA may enter into additional agreements to expand these programs to other sites." This attachment is a request to expand the location of Supportive Services Housing to a Public Housing duplex under PMHA's scattered site project #OH031-02, located at 213 S. Willow St., Kent. This property was chosen as it has been used as a homeless shelter in the past, and has the appropriate zoning and meets Kent Health Department licensure requirements to serve as a temporary shelter. No alterations would be needed for the building. Because it was used as the County's only homeless shelter until the recent opening of the Miller Community House, no public housing families will be displaced or affected by this designation.

PMHA is requesting to use the building for individuals and families referred from the Miller Community House, which is a short-term emergency residential facility. Families in the shelter are provided with extensive advocacy and services in order to assist them in obtaining permanent housing upon departing from the shelter. Some of the shelter families are provided with housing assistance from Portage Area Transitional Housing (PATH), in conjunction with Section 8 MTW Vouchers from PMHA. This provides the family with permanent housing, however, it takes several months for the family to be determined eligible for the Voucher and to locate suitable Section 8 housing. In the meantime, the family is taking up space in the shelter that could be better utilized for another homeless family in crisis.

To remedy this inefficient use of shelter space, then on-site operator of the shelter, Family and Community Services of Portage County, would like to utilize the 213 S. Willow Street property to house families referred from the shelter, who are waiting to move into permanent housing. The anticipated length of occupancy of each family at Willow would be between one and three months.

Occupants of Willow would have to meet the standard PMHA housing eligibility criteria. In addition, they would have to meet the 4 criteria stated in the Supportive Services Housing section of the MTW Agreement Appendix cited above. (These criteria are: homeless with dependent children, committed to working on a self-sufficiency plan of action, having no violent crime or drug conviction within the last 5 years unless a significant change of behavior is evident, and no active abuse of alcohol or drugs and a willingness to ensure a drug, alcohol and violence-free living environment.) Willow occupants will be provided with supportive services by the PATH staff on-site, as well as

at other locations where PATH activities take place. These services will be provided at no cost to the participants or the PMHA.

The PMHA would enter into an agreement with Family and Community Services of Portage County (FCS), as it has previously for use of public housing units and community space at Community Estates and Renaissance Place. Given the short-term nature of the occupancy, leases would not be executed with the individual families residing at Willow. Instead, the agreement between PMHA and FCS would state the occupancy and eligibility requirements, responsibilities of each party, and the rent, which would be the responsibility of FCS to forward to the PMHA monthly. The monthly rent would be equal to the amount of the average tenant contribution for units under project #OH31 -02, doubled (as Willow is considered 2 units under the ACC). The rent would be fixed for one year, and would be reviewed annually and adjusted as necessary to reflect the average tenant contribution for the prior year.

The designation of 213 S. Willow St., Kent as a short-term transitional housing facility will benefit a significant number of homeless families. It will provide families leaving the shelter with affordable housing and supportive services, while they wait to move into permanent housing. As this transitional use of Willow will open space at the only homeless shelter in Portage County, a greater number of homeless families will be able to receive housing at the shelter. This endeavor will benefit homeless families and the community at large, without creating any additional burden on the PMHA. It is an advantageous arrangement for everyone involved.

Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) **Part I: Summary**

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0157  
(exp. 7/31/98)

HAName: <b>Portage Metropolitan Housing Authority</b>	Comprehensive Grant Number: <b>OH12PO31707</b>	FFY of Grant Approval: <b>1999</b>
---	--	------------------------------------

☐ Original Annual Statement
 ☐ Reserve for Disasters/Emergencies
 ☐ Revised Annual Statement/Revision Number
 ☒ Performance and Evaluation report for Program Year Ending Jun-02

☐ Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGPF Funds	0.00	0.00	0.00	0.00
2	1406 Operations (May not exceed 10% of line 19)	0.00	0.00	0.00	0.00
3	1408 Management Improvements	101,700.00	85,626.98	85,626.98	85,626.98
4	1410 Administration	61,574.20	50,914.94	50,914.94	50,914.94
5	1411 Audit	1,500.00	1,500.00	1,500.00	1,500.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	0.00	12,349.45	12,349.45	12,349.45
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	52,000.00	36,356.96	36,356.96	36,356.96
10	1460 Dwelling Structures	324,400.00	306,710.43	306,710.43	306,710.43
11	1465.1 Dwelling Equipment-Nonexpendable	1,200.00	1,200.00	1,200.00	1,200.00
12	1470 Nondwelling Structures	0.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	15,700.00	14,004.83	14,004.83	14,004.83
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	45,000.00	107,078.41	107,078.41	107,078.41
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1498 Mod used for Development	0.00	0.00	0.00	0.00
19	1502 Contingency (may not exceed 8% of line 20)	12,667.80	0.00	0.00	0.00
20	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>	<b>615,742.00</b>	<b>615,742.00</b>	<b>615,742.00</b>	<b>615,742.00</b>
21	Amount of line 19 Related to LBP Activities	0.00	0.00	0.00	0.00
22	Amount of line 19 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
23	Amount of line 19 Related to Security	30,000.00	17,851.23	0.00	0.00
24	Amount of line 19 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**X** Director, September 30, 2002

**X**

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.  
(2) To be completed for the Performance and Evaluation Report.

Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0157  
(exp. 7/31/98)

Development Number/Name	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
HA-Wide	<b>Operations</b>	<b>1406</b>		0.00	0.00	0.00	0.00	
HA-Wide	<b>Management Improvements</b>	<b>1408</b>						
	Resident Security			30,000.00	17,851.23	17,851.23	17,851.23	
	Develop Job Training & Business							
	Develop Programs			20,000.00	29,032.58	29,032.58	29,032.58	
	Coordinator of Social Services for Drug Elimination			33,700.00	33,955.68	33,955.68	33,955.68	
	Staff Training			8,000.00	331.70	331.70	331.70	
	GAAP Conversion and Software			10,000.00	3,833.79	3,833.79	3,833.79	
	Management Services				622.00	622.00	622.00	
	Total for Management Improvements			101,700.00	85,626.98	85,626.98	85,626.98	
HA-Wide	<b>Administration</b>	<b>1410</b>						
	a. Salaries	1410.1		44,788.00	35,971.53	35,971.53	35,971.53	
	b. Fringe Benefits	1410.9		15,466.20	14,032.02	14,032.02	14,032.02	
	c. Advertising	1410.19		1,320.00	911.39	911.39	911.39	
	Total for Administration			61,574.20	50,914.94	50,914.94	50,914.94	
HA-Wide	<b>Fees &amp; Costs</b>	<b>1430</b>						
	a. Architect				12,349.45	12,349.45	12,349.45	
	Total for Fees & Costs			0.00	12,349.45	12,349.45	12,349.45	
HA-Wide	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide	<b>Nondwelling Equipment</b>	<b>1475</b>						
	a. Typewriter/office Equipment			5,500.00	14,004.83	14,004.83	14,004.83	
	b. Dump Bed Liner for Pickup Truck			3,500.00	0.00			Moved to 706
	c. Trailer			3,200.00	0.00			Moved to 706
	d. Key Machine			3,500.00	0.00			Moved to 706
	Total for Nondwelling Equipment			15,700.00	14,004.83	14,004.83	14,004.83	
HA-Wide	<b>Relocation Cost</b>	<b>1495.1</b>		0.00	0.00	0.00	0.00	
HA-Wide	<b>Contingency</b>	<b>1502</b>		12,667.80	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**Director, September 30, 2002**

**X**

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form **HUD-52837** (10/96)

(2) To be completed for the Performance and Evaluation Report.

ref Handbook 7485.3



Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0157  
(exp. 7/31/98)

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-02 Scattered Sites St. Rt. 183       3701 Duffield	<b>Site Improvement</b>	<b>1450</b>						
	Increase Parking & Driveway Include Excavation, Drainage & Retaining Wall	1450.11	4	20,000.00	7,560.00	7,560.00	7,560.00	
	Total for Site Improvement			20,000.00	7,560.00	7,560.00	7,560.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Gutters	1460.14			761.00	761.00	761.00	
	Insulation	1460.21			500.00	500.00	500.00	
	Electric Upgrade	1460.15			750.00	750.00	750.00	
	Rehab Kitchen	1460.11			10,279.43	10,279.43	10,279.43	
	Total for Dwelling Structures			0.00	12,290.43	12,290.43	12,290.43	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**Director, September 30, 2002**

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Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-03 Ravenna Woods	<b>Site Improvement</b>	<b>1450</b>						
	Trim Trees and Remove Tree Stumps	1450.11	As Needed	15,000.00	13,110.00	13,110.00	13,110.00	
	Total for Site Improvement			15,000.00	13,110.00	13,110.00	13,110.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Bath Tubs	1460.13	28	45,000.00	38,724.40	38,724.40	38,724.40	
	Total for Dwelling Structures			45,000.00	38,724.40	38,724.40	38,724.40	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

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Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**Director, September 30, 2002**

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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-05 Town Square Villas	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Bath Tubs	1460.13	30	48,000.00	35,529.80	35,529.80	35,529.80	Moved to 706
	Replace Closet Doors	1460.21	90	25,000.00	0.00	0.00	0.00	
	Total for Dwelling Structures			73,000.00	35,529.80	35,529.80	35,529.80	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**Director, September 30, 2002**

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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-06 Etna House	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Shingle Roof	1460.18	7,000 SF	34,000.00	67,540.00	67,540.00	67,540.00	
	Replace Fire Escape	1460.14	1	35,000.00	26,756.00	26,756.00	26,756.00	
	Total for Dwelling Structures			69,000.00	94,296.00	94,296.00	94,296.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**Director, September 30, 2002**

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form **HUD-52837** (10/96)

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U.S. Department of Housing  
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OMB Approval No. 2577-0157  
(exp. 7/31/98)

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-09 Heritage Knolls	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Roofs	1460.18	9	70,000.00	41,700.00	41,700.00	41,700.00	
	Replace Storm Doors	1460.21	56	15,400.00	17,160.00	17,160.00	17,160.00	
	Replace Closet Doors	1460.21	150	25,000.00	0.00	0.00	0.00	
	Replace Bath Tubs	1460.13	30	0.00	34,654.80	34,654.80	34,654.80	Moved to 706 moved up from 708
	Total for Dwelling Structures			110,400.00	93,514.80	93,514.80	93,514.80	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**Director, September 30, 2002**

**X**

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form **HUD-52837** (10/96)

(2) To be completed for the Performance and Evaluation Report.

ref Handbook 7485.3

Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0157  
(exp. 7/31/98)

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-10 Ravenna Scattered	<b>Site Improvement</b>	<b>1450</b>						
	Install Sheds		10	17,000.00	12,166.96	12,166.96	12,166.96	
	Total for Site Improvement			17,000.00	12,166.96	12,166.96	12,166.96	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Flooring (carpet bedrooms & Replace tile in Kitchen and Bathrooms Replace Storm Doors	1460.13 1460.21	9,000 SF 20	21,000.00 6,000.00	23,800.00 2,600.00	23,800.00 2,600.00	23,800.00 2,600.00	
	Total for Dwelling Structures			27,000.00	26,400.00	26,400.00	26,400.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Replace Refrigerators, stoves, & Hoods	1465.11			1,200.00	1,200.00	1,200.00	
	Total for Dwelling Equipment-Nonexp.			0.00	1,200.00	1,200.00	1,200.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**Director, September 30, 2002**

**X**

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

(2) To be completed for the Performance and Evaluation Report.

form **HUD-52837** (10/96)

ref Handbook 7485.3

Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0157  
(exp. 7/31/98)

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-11 Washington Group Home	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Total for Dwelling Structures			0.00	0.00	0.00	0.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Install Kitchen Appliances	1465.11	1 ea	1,200.00	0.00	0.00	0.00	Moveto 706 to obligate savings
	Total for Dwelling Equipment-Nonexp.			1,200.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**Director, September 30, 2002**

**X**

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

(2) To be completed for the Performance and Evaluation Report.

form **HUD-52837** (10/96)

ref Handbook 7485.3

Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0157  
(exp. 7/31/98)

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-04 Eastowne Manor	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Terrace Repair	1460.18			0.00	0.00	0.00	Moved to 706 to obligate savings
	Total for Dwelling Structures			0.00	0.00	0.00	0.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Non dwelling Structures</b>	<b>1470</b>						
	Total for Non dwelling Structures			0.00	0.00	0.00	0.00	
	<b>Non dwelling Equipment</b>	<b>1475</b>						
	Total for Non dwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**Director, September 30, 2002**

**X**

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

(2) To be completed for the Performance and Evaluation Report.

form **HUD-52837** (10/96)

ref Handbook 7485.3



Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0157  
(exp. 7/31/98)

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-15 Acquisition Rehab	<b>Site Improvement</b>	<b>1450</b>						
	3138 Polly Rd. Concrete Drive				3,520.00	3,520.00	3,520.00	
	Total for Site Improvement			0.00	3,520.00	3,520.00	3,520.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	3138 Polly Rd. Window Replacement	1460.14			3,000.00	3,000.00	3,000.00	
	Replace Kit. Cabinets & Counter Tops	1460.11			1,940.00	1,940.00	1,940.00	
	Gutters	1460.14			1,015.00	1,015.00	1,015.00	
	Total for Dwelling Structures			0.00	5,955.00	5,955.00	5,955.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**Director, September 30, 2002**

**X**

# RevisedImplementationSchedule707

AnnualStatement/PerformanceandEvaluationReport

ComprehensiveGrantProgram(CGP) PartIII:ImplementationSchedule

U.S.DepartmentofHousing

andUrbanDevelopment

OfficeofPublicandIndianHousing

OMBApprovalNo.2577-0157

(exp.7/31/98)

Development Number/Name HA-Wide Activities	AllFundsObligated(QuarterEndingDate)			AllFundsExpended(QuarterEndingDate)			ReasonsforRevisedTargetDates(2)
	Original	Revised(1)	Actual(2)	Original	Revised(1)	Actual(2)	
OH31-02 ScatteredSites St.Rt.183 Duffield	03/31/00	12/31/00		06/30/01			
OH31-03 RavennaWoods	06/30/00	06/30/01		09/30/01	12/31/01		Ongoing
OH31-04 EastowneManor		06/31/01			12/31/01		Ongoing
OH31-05 TownSquare	09/30/00	06/31/01		09/30/01	12/31/01		Ongoing
OH31-06 EtnaHouse	09/30/00	01/31/01		09/30/01			Completed
OH31-09 HeritageKnolls	9/30/200	06/30/01		09/30/01	12/31/01		Ongoing
OH31-10 SingleFamily	09/30/00	06/30/01		09/30/01	06/30/02		JobsTrainingProgram
OH31-11 WashGroup	03/31/00	06/31/01		06/30/01	12/31/01		Movedto706toObligateSavings
OH31-15 AcqRehab		09/30/01			12/30/01		Movedto707from50100
HA-Wide Mgmt.Impr.	09/30/02	09/30/01		12/31/02	06/30/02		
Administration	09/30/02	09/30/01		12/31/02	06/30/02		
Fees&Costs	09/30/02	09/30/01		12/31/02	06/30/02		
Contingency	09/30/02	09/30/01		12/31/02	06/30/02		

SignatureofExecutiveDirector&Date:

SignatureofPublicHousingDirector/OfficeofNativeAmericanProgramsAdministrator&Date:

**X** Director,September25,2001

**X** Page1of4

(1)TobecompletedforthePerformanceandEvaluationReportoraRevisedAnnualStatement.

form HUD-52837(10/96)

(2)TobecompletedforthePerformanceandEvaluationReport.

refHandbook7485.3

**U.S. Department of Housing  
and Urban Development**  
Office of Public and Indian Housing

(exp.7/31/98)

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:	
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**X**

Page3of4

form HUD-52837(10/96)

refHandbook7485.3

**U.S. Department of Housing  
and Urban Development**  
Office of Public and Indian Housing

OfficeofPublicandIndianHousing

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**X**

Annual Statement/Performance and Evaluation Report  
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary

HAName:

Portage Metropolitan Housing Authority

Grant Type and Number: OH12PO3150100  
Capital Fund Program Grant No. 2000

Replacement Housing Factor Grant No.

FFY of Grant Approval:

2000 OH12PO3150100

2000

☐ Original Annual Statement ☐ Reserve for Disasters/Emergencies

☐ Revised Annual Statement/Revision Number \_\_\_\_\_

☒ Performance and Evaluation report for Program Year Ending 2-Jun

☐ Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGPF Funds	0.00	0.00	0.00	0.00
2	1406 Operations (May not exceed 10% of line 20)	29,071.00	57,867.00	57,867.00	43,540.60
3	1408 Management Improvements	68,892.00	75,753.00	75,753.00	61,041.86
4	1410 Administration	49,761.00	50,868.43	50,868.43	50,868.43
5	1411 Audit	1,500.00	1,700.00	1,700.00	1,700.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	0.00	12,362.26	12,362.26	4,236.84
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	91,880.00	52,816.50	52,816.50	52,816.50
10	1460 Dwelling Structures	203,000.00	209,150.56	209,150.56	180,954.90
11	1465.1 Dwelling Equipment-Nonexpendable	11,250.00	44,805.77	44,805.77	44,805.77
12	1470 Nondwelling Structures	2,000.00	1,770.00	1,770.00	1,770.00
13	1475 Nondwelling Equipment	26,500.00	45,256.48	45,256.48	37,756.40
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	21,327.00	30,327.00	30,327.00	19,495.63
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1498 Mod used for Development	0.00	0.00	0.00	0.00
19	1502 Contingency (may not exceed 8% of line 20)	6,826.00	0.00	0.00	0.00
20	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>	<b>512,007.00</b>	<b>582,677.00</b>	<b>582,677.00</b>	<b>498,986.93</b>
21	Amount of line 20 Related to LBP Activities	0.00	0.00	0.00	0.00
22	Amount of line 20 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
23	Amount of line 20 Related to Security	5,000.00	5,000.00	0.00	0.00
24	Amount of line 20 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

Signature of Executive Director & Date:

**X Director, June 30, 2002**

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**X**

Annual Statement/Performance and Evaluation Report  
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP, CFPRHF)

Part II: Supporting Pages

PHAName: Portage Metropolitan Housing Authority			Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000			Federal FY of Grant: 2000		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
HA-Wide	<b>Operations</b>	<b>1406</b>		29,071.00	57,867.00	57,867.00	43,540.60	
HA-Wide	<b>Management Improvements</b>	<b>1408</b>						
	a. Management/Residents Improvements			5,000.00	5,000.00	5,000.00	2,983.72	
	b. Develop Job Training and Bus. Deve.			28,139.00	35,000.00	35,000.00	22,305.14	
	c. Coordinator of Social Services for Drug Elimination			35,753.00	35,753.00	35,753.00	35,753.00	
	Total for Management Improvements			68,892.00	75,753.00	75,753.00	61,041.86	
HA-Wide	<b>Administration</b>	<b>1410</b>						
	a. Salaries	1410.1		34,632.69	35,670.00	35,670.00	35,670.00	
	b. Fringe Benefits	1410.9		13,928.31	14,303.20	14,303.20	14,303.20	
	c. Advertising	1410.19		1,200.00	895.23	895.23	895.23	
	Total for Administration			49,761.00	50,868.43	50,868.43	50,868.43	
HA-Wide	<b>Fees &amp; Costs</b>	<b>1430</b>						
	A&E Services				12,362.26	12,362.26	4,236.84	
	Total for Fees & Costs			0.00	12,362.26	12,362.26	4,236.84	
HA-Wide	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide	<b>Nondwelling Equipment</b>	<b>1475</b>						
	File Cabinet		2	1,500.00	692.00	692.00	692.00	
	Office Equipment			3,000.00	18,100.80	18,100.80	10,600.72	
	Trailer				1,385.00	1,385.00	1,385.00	
	Dump Liner				2,900.00	2,900.00	2,900.00	
	Maintenance Vehicle			22,000.00	22,178.68	22,178.68	22,178.68	
	Total for Nondwelling Equipment		1	26,500.00	45,256.48	45,256.48	37,756.40	Moved from 707 Moved from 707
HA-Wide	<b>Relocation Cost</b>	<b>1495.1</b>		0.00	0.00	0.00	0.00	
HA-Wide	<b>Contingency</b>	<b>1502</b>		6,826.00	0.00	0.00	0.00	
Signature of Executive Director & Date:				Signature of Public Housing Director/Office of Native American Programs Administrator & Date:				
<b>X Director, June 30, 2002</b>				<b>X</b>				

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP, CFPRHF)

Part II: Supporting Pages

PHAName: Portage Metropolitan Housing Authority		Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000				Federal FY of Grant: 2000		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-01 Athena Gardens	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Tile in Kitchens and Baths	1460.13	All	15,000.00	21,102.56	21,102.56	21,102.56	
	Replace Range Hoods		25	5,000.00	0.00	0.00	0.00	
	Replace Windows	1460.14	125	52,250.00	56,895.50	56,895.50	56,895.50	
	Total for Dwelling Structures			72,250.00	77,998.06	77,998.06	77,998.06	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Replace Range Hoods	1465.11	25		2,470.45	2,470.45	2,470.45	
	Ranges and Refrigerators	1465.11	25 ea		16,250.00	16,250.00	16,250.00	
	Total for Dwelling Equipment-Nonexp.			0.00	18,720.45	18,720.45	18,720.45	
	<b>Nondwelling Structures</b>	<b>1470</b>						
Total for Nondwelling Structures			0.00	0.00	0.00	0.00		
<b>Nondwelling Equipment</b>	<b>1475</b>							
Total for Nondwelling Equipment			0.00	0.00	0.00	0.00		
Signature of Executive Director & Date:				Signature of Public Housing Director/Office of Native American Programs Administrator & Date:				
X Director, June 30, 2002				X				



## Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP, CFPRHF)

## Part II: Supporting Pages

PHAName: Portage Metropolitan Housing Authority			Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000			Federal FY of Grant: 2000		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-01 Community Estates	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Tile in Kitchens and Bath	1460.13	All	17,500.00	18,000.00	18,000.00	18,000.00	
	Total for Dwelling Structures			17,500.00	18,000.00	18,000.00	18,000.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Ranges and Refrigerators	1465.11	29ea		18,850.00	18,850.00	18,850.00	
	Total for Dwelling Equipment-Nonexp.			0.00	18,850.00	18,850.00	18,850.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	
Signature of Executive Director & Date:				Signature of Public Housing Director/Office of Native American Programs Administrator & Date:				
<b>X Director, June 30, 2002</b>				<b>X</b>				

Annual Statement/Performance and Evaluation Report  
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP, CFPRHF)

Part II: Supporting Pages

PHAName: Portage Metropolitan Housing Authority			Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000			Federal FY of Grant: 2000		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-02 Scattered Sites	<b>Site Improvement</b>	<b>1450</b>						
	3701 Duffield St.							
	Drainage	1450.11	125 LF	1,500.00	0.00	0.00	0.00	Moved to 707
	Replace Fence	1450.11	200 LF	3,000.00	4,381.50	4,381.50	4,381.50	
	Repair Driveway	1450.11	1	2,500.00	0.00	0.00	0.00	Moved to 707
	Fill Ditch Behind Unit	1450.11	110 LF	4,250.00	0.00	0.00	0.00	Moved to 707
	Total for Site Improvement			11,250.00	4,381.50	4,381.50	4,381.50	
	<b>Dwelling Structures</b>	<b>1460</b>						
	3701 Duffield St.							
	Replace Gutters	1460.14	85 LF	800.00	0.00	0.00	0.00	Moved to 707
	Insulation	1460.21	As Needed	1,000.00	0.00	0.00	0.00	Moved to 707
	Upgrade Electric	1460.15	As Needed	1,500.00	0.00	0.00	0.00	Moved to 707
	Rehab Entire Kitchen	1460.11	All	10,000.00	0.00	0.00	0.00	Moved to 707
	Range, Hood, and Refrigerator	1460.11	1 ea.	1,000.00	0.00	0.00	0.00	Moved to 707
	Total for Dwelling Structures			14,300.00	0.00	0.00	0.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Range, Hood, and Refrigerator	1465.11	1 ea.		735.32	735.32	735.32	
	Total for Dwelling Equipment-Nonexp.			0.00	735.32	735.32	735.32	
<b>Nondwelling Structures</b>	<b>1470</b>							
Total for Nondwelling Structures			0.00	0.00	0.00	0.00		
<b>Nondwelling Equipment</b>	<b>1475</b>							
Total for Nondwelling Equipment			0.00	0.00	0.00	0.00		
Signature of Executive Director & Date:				Signature of Public Housing Director/Office of Native American Programs Administrator & Date:				
X Director, June 30, 2002				X				

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP.CFPRHF)

Part II: Supporting Pages

PHAName: Portage Metropolitan Housing Authority			Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000			Federal FY of Grant: 2000		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-04 Eastowne Manor	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Floor Tile	1460.13	All	20,000.00	19,300.00	19,300.00	19,300.00	
	Install Hand Rail-East Side	1460.14	1	2,500.00	1,640.00	1,640.00	1,640.00	
	Total for Dwelling Structures			22,500.00	20,940.00	20,940.00	20,940.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	
Signature of Executive Director & Date:				Signature of Public Housing Director/Office of Native American Programs Administrator & Date:				
<b>X Director, June 30, 2002</b>				<b>X</b>				

## Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP.CFPRHF)

## Part II: Supporting Pages

PHAName: Portage Metropolitan Housing Authority			Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000			Federal FY of Grant: 2000		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-09 Heritage Knolls	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Bath Tubs	1460.2	30	45,000.00	0.00	0.00	0.00	Savings Moved to 707
	Total for Dwelling Structures			45,000.00	0.00	0.00	0.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	
Signature of Executive Director & Date:				Signature of Public Housing Director/Office of Native American Programs Administrator & Date:				
<b>X Director, June 30, 2002</b>				<b>X</b>				

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP.CFPRHF)

Part II: Supporting Pages

PHAName: Portage Metropolitan Housing Authority			Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000			Federal FY of Grant: 2000		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-10 Ravenna Scattered	<b>Site Improvement</b>	<b>1450</b>						
	Fence in Back Yard	1450.11	2480 LF	46,130.00	32,500.00	32,500.00	32,500.00	
	Total for Site Improvement			46,130.00	32,500.00	32,500.00	32,500.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Countertops	1460.11	10	12,000.00	5,500.00	5,500.00	5,500.00	
	Total for Dwelling Structures			12,000.00	5,500.00	5,500.00	5,500.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Replace Ranges	1465.11	10	5,250.00	2,800.00	2,800.00	2,800.00	Moved Range hood to 707
	Replace Refrigerators	1465.11	10	6,000.00	3,700.00	3,700.00	3,700.00	
	Total for Dwelling Equipment-Nonexp.			11,250.00	6,500.00	6,500.00	6,500.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	
Signature of Executive Director & Date:				Signature of Public Housing Director/Office of Native American Programs Administrator & Date:				
X Director, June 30, 2002				X				

Annual Statement/Performance and Evaluation Report  
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP, CFPRHF)

Part II: Supporting Pages

PHAName: PortageMetropolitanHousingAuthority		GrantTypeandNumber:OH12PO3150100 CapitalFundProgramGrantNo:2000 ReplacementHousingFactorGrantNo:2000				FederalFYofGrant:2000		
Development Number/Name HA-Wide Activities	GeneralDescriptionofMajor WorkCategories	Development Account Number	Quantity	TotalEstimatedCost		TotalActualCost		StatusofProposedWork(2)
				Original	Revised(1)	Funds Obligated(2)	Funds Expended(2)	
OH31-15 Acquisition Rehab	<b>SitelImprovement</b>	<b>1450</b>						
	3036PollyRd. ConcreteDriveandDrainage	1450.11	1146LF	10,000.00	4,420.00	4,420.00	4,420.00	Movedto707
	3138PollyRd. ConcreteDrive 9500St.Rt.700	1450.11	1100LF	7,500.00	0.00	0.00	0.00	
	ConcretePartialDrive GravelRemainingDrive	1450.11	1200LF	6,500.00	5,740.00	5,740.00	5,740.00	
	1391FairviewRd. ConcreteDrive	1450.11	350LF	3,000.00	0.00	0.00	0.00	
		1450.11	85LF	7,500.00	5,775.00	5,775.00	5,775.00	
	TotalforSitelImprovement			34,500.00	15,935.00	15,935.00	15,935.00	
	<b>DwellingStructures</b>	<b>1460</b>						
	3147DennyRd. ReplaceGuttersandDownspouts	1460.14	all	4,200.00	1,015.00	1,015.00	1,015.00	completedprior
	3036PollyRd. ReplaceWindows	1460.14	2	2,000.00	0.00	0.00	0.00	
	ReplaceGuttersandDownspouts	1460.14			750.00	750.00	750.00	
	3138PollyRd. ReplaceWindows(Slider,LVrm,Bedrm)	1460.14	4	3,250.00	0.00	0.00	0.00	Movedto707
	ReplaceKit.Cabinets&CounterTop	1460.11	All	10,000.00	0.00	0.00	0.00	Movedto707
	TotalforDwellingStructures			19,450.00	1,765.00	1,765.00	1,765.00	
	<b>DwellingEquipment-Nonexpendable</b>	<b>1465.1</b>						
	TotalforDwellingEquipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>NondwellingStructures</b>	<b>1470</b>						
	3036Pollyrd. InstallShed	1470.11	1	2,000.00	1,770.00	1,770.00	1,770.00	
	TotalforNondwellingStructures			2,000.00	1,770.00	1,770.00	1,770.00	
	<b>NondwellingEquipment</b>	<b>1475</b>						
	TotalforNondwellingEquipment			0.00	0.00	0.00	0.00	
SignatureofExecutiveDirector&Date:				SignatureofPublicHousingDirector/OfficeofNativeAmericanprogramsAdministrator&Date:				
X Director,June30,2002				X				

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP.CFPRHF)

Part II: Supporting Pages

PHAName: Portage Metropolitan Housing Authority			Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000			Federal FY of Grant: 2000		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-06 Etna House	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	HVAC Unit	1460.16			3,040.00	3,040.00	3,040.00	
	Total for Dwelling Structures			0.00	3,040.00	3,040.00	3,040.00	Moved from 706
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	HVAC Unit	1475.11		0.00	0.00			
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	
Signature of Executive Director & Date:				Signature of Public Housing Director/Office of Native American Programs Administrator & Date:				
<b>X Director, June 30, 2002</b>				<b>X</b>				

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP.CFPRHF)

Part II: Supporting Pages

PHAName: PortageMetropolitanHousingAuthority		GrantTypeandNumber:OH12PO3150100 CapitalFundProgramGrantNo:2000 ReplacementHousingFactorGrantNo:2000				FederalFYofGrant:2000		
Development Number/Name HA-Wide Activities	GeneralDescriptionofMajor WorkCategories	Development Account Number	Quantity	TotalEstimatedCost		TotalActualCost		StatusofProposedWork(2)
				Original	Revised(1)	Funds Obligated(2)	Funds Expended(2)	
OH31-05 TownSquare Villas	<b>Sitelmprovement</b>	<b>1450</b>						Movedfrom50101to obligatesavings
	TotalforSitelmprovement			0.00	0.00	0.00	0.00	
	<b>DwellingStructures</b>	<b>1460</b>						
	ReplacementofWindow	1460.14			79,800.00	81,907.50	53,711.84	
	TotalforDwellingStructures			0.00	79,800.00	81,907.50	53,711.84	
	<b>DwellingEquipment-Nonexpendable</b>	<b>1465.1</b>						
	TotalforDwellingEquipment-Nonexp.			0.00	0.00	0.00	0.00	
<b>NondwellingStructures</b>	<b>1470</b>							
TotalforNondwellingStructures			0.00	0.00	0.00	0.00		
<b>NondwellingEquipment</b>	<b>1475</b>							
TotalforNondwellingEquipment				0.00	0.00	0.00	0.00	
SignatureofExecutiveDirector&Date:				SignatureofPublicHousingDirector/OfficeofNativeAmericanprogramsAdministrator&Date:				
X Director,June30,2002				X				



## Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP, CFPRHF)

## Part II: Supporting Pages

PHAName: Portage Metropolitan Housing Authority			Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000			Federal FY of Grant: 2000		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
Tenth Project	<b>Sitel Improvement</b>	<b>1450</b>						
	Total for Sitel Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Total for Dwelling Structures			0.00	0.00	0.00	0.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	
Signature of Executive Director & Date:				Signature of Public Housing Director/Office of Native American Programs Administrator & Date:				
<b>X Director, June 4, 2002</b>				<b>X</b>				

# REVISED IMPLEMENTATION SCHEDULE 50100

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFRHF)

Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
OH31-1 Athena Gardens	06/30/00	12/31/00		03/31/01	06/30/01		Environmental Review Compliance
OH31-01 Community Estates	06/30/00	06/30/01		03/31/01	12/31/01		Environmental Review Compliance
OH31-2 Scattered Sites	09/30/00	12/31/01		06/30/01	12/31/01		Environmental Review Compliance
OH31-4 Eastowne Manor	06/30/00	06/30/01		03/31/01	12/31/01		Environmental Review Compliance
OH31-05 Town Square Villas		12/31/01			06/30/02		Moved from 50101 to 50100 to Obligate Savings
OH31-09 Heritage Knolls	09/30/00	06/30/01		06/30/01	12/31/01		Environmental Review Compliance
OH31-10 Ravenna Scattered	09/30/00	12/31/01		06/30/01	12/31/01		Environmental Review Compliance
OH31-15 Acquisition Rehab	06/30/00	09/31/01		03/31/01	12/31/01		Environmental Review Compliance
HA-Wide Mgmt. Impr.	12/31/01	09/30/02		12/31/01	12/31/02		
Administration	12/31/01	09/30/02		12/31/01	12/31/02		
Fees & Costs	12/31/01	09/30/02		12/31/01	12/31/02		
Contingency	12/31/01	09/30/02		12/31/01	12/31/02		

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

X

Director, September 25, 2001

X

AnnualStatement/PerformanceandEvaluationReport  
ComprehensiveGrantProgram(CGP) **PartIII:ImplementationSchedule**

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

OMBApprovalNo.2577-0157  
(exp.7/31/98)

Development Number/Name HA-Wide Activities	AllFundsObligated(QuarterEndingDate)			AllFundsExpended(QuarterEndingDate)			ReasonsforRevisedTargetDates(2)
	Original	Revised(1)	Actual(2)	Original	Revised(1)	Actual(2)	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**X**

**X**

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

(2) To be completed for the Performance and Evaluation Report.

form HUD-52837(10/96)

refHandbook7485.3

AnnualStatement/PerformanceandEvaluationReport  
ComprehensiveGrantProgram(CGP) **PartIII:ImplementationSchedule**

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

OMBApprovalNo.2577-0157  
(exp.7/31/98)

Development Number/Name HA-Wide Activities	AllFundsObligated(QuarterEndingDate)			AllFundsExpended(QuarterEndingDate)			ReasonsforRevisedTargetDates(2)
	Original	Revised(1)	Actual(2)	Original	Revised(1)	Actual(2)	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**X**

**X**

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

(2) To be completed for the Performance and Evaluation Report.

form HUD-52837(10/96)

refHandbook7485.3

Annual Statement/Performance and Evaluation Report  
Capital Fund Program and Capital Fund Replacement Housing Factor (CFP/CFPRHF)

Part I: Summary

HAName:  
Portage Metropolitan Housing Authority

Grant Type and Number: OH12PO3150101  
Capital Fund Program Grant No: 2001  
Replacement Housing Factor Grant No:  
OH12PO31501012001

CFP of Grant Approval:  
2001

☐ Original Annual Statement ☐ Reserve for Disasters/Emergencies ☐ Revised Annual Statement/Revision Number \_\_\_\_\_  
☒ Performance and Evaluation report for Program Year Ending 2-Jun ☐ Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGPF Funds	0.00	0.00	0.00	0.00
2	1406 Operations (May not exceed 10% of line 19)	7,742.00	35,097.00	35,097.00	0.00
3	1408 Management Improvements	77,930.00	77,930.00	77,930.00	22,202.58
4	1410 Administration	63,410.00	51,200.00	51,200.00	2,204.98
5	1411 Audit	1,500.00	2,000.00	2,000.00	0.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	0.00	15,000.00	15,000.00	467.70
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	88,000.00	78,500.00	11,626.00	1,988.87
10	1460 Dwelling Structures	244,700.00	261,200.00	43,725.00	12,073.76
11	1465.1 Dwelling Equipment-Nonexpendable	4,250.00	4,250.00	0.00	0.00
12	1470 Nondwelling Structures	0.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	0.00	13,108.00	13,108.00	810.00
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	20,000.00	45,000.00	45,000.00	18,281.35
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1498 Mod used for Development	0.00	0.00	0.00	0.00
19	1502 Contingency (may not exceed 8% of line 20)	4,475.00	12,500.00	12,500.00	0.00
20	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>	<b>512,007.00</b>	<b>595,785.00</b>	<b>307,186.00</b>	<b>58,029.24</b>
21	Amount of line 19 Related to LBP Activities	0.00	0.00	0.00	0.00
22	Amount of line 19 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
23	Amount of line 19 Related to Security	5,000.00	5,000.00	0.00	0.00
24	Amount of line 19 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

Signature of Executive Director & Date:

**X Director, June 30, 2002**

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**X**

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

(2) To be completed for the Performance and Evaluation Report.

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFRHF)

**Part II: Supporting Pages**

PHAName:			Grant Type and Number OH12PO3150101 Capital Fund Program Grant No. 2001 Replacement Housing Factor Grant No. 2001			Federal FY of Grant: 2001		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
HA-Wide	<b>Operations</b>	<b>1406</b>		7,742.00	35,097.00	35,097.00	0.00	
HA-Wide	<b>Management Improvements</b>	<b>1408</b>						
	Resident Security			5,000.00	5,000.00	5,000.00	0.00	
	Develop Job Training & Business							
	Develop Programs			35,000.00	35,000.00	35,000.00	0.00	
	Coordinator of Social Services for Drug Elimination			37,930.00	37,930.00	37,930.00	22,202.58	
	Total for Management Improvements			77,930.00	77,930.00	77,930.00	22,202.58	
HA-Wide	<b>Administration</b>	<b>1410</b>						
	a. Salaries	1410.1		46,130.00	38,462.00	38,462.00	1,065.40	
	b. Fringe Benefits	1410.9		15,930.00	11,538.00	11,538.00	411.91	
	c. Advertising	1410.19		1,350.00	1,200.00	1,200.00	727.67	
	Total for Administration			63,410.00	51,200.00	51,200.00	2,204.98	
HA-Wide	<b>Fees &amp; Costs</b>	<b>1430</b>						
	a. Architect			0.00	15,000.00	15,000.00	467.70	
	Total for Fees & Costs			0.00	15,000.00	15,000.00	467.70	
HA-Wide	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide	<b>Nondwelling Equipment</b>	<b>1475</b>						
	a. Office Equipment				13,108.00	13,108.00	810.00	
	Total for Nondwelling Equipment			0.00	13,108.00	13,108.00	810.00	
HA-Wide	<b>Relocation Cost</b>	<b>1495.1</b>		0.00	0.00	0.00	0.00	
HA-Wide	<b>Contingency</b>	<b>1502</b>		4,475.00	12,500.00	12,500.00	0.00	
Signature of Executive Director & Date:				Signature of Public Housing Director / Office of Native American Programs Administrator & Date:				
Director, June 30, 2002				X				

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFRHF)

**Part II: Supporting Pages**

PHAN Name:			Grant Type and Number OH12PO3150101 Capital Fund Program Grant No. 2001 Replacement Housing Factor Grant No. 2001			Federal FY of Grant: 2001		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-01 Athena Gardens	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Front and Back Entrance Doors and Shed Doors	1460.21	75	42,400.00	42,400.00	0.00	0.00	
	Total for Dwelling Structures			42,400.00	42,400.00	0.00	0.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	
Signature of Executive Director & Date:				Signature of Public Housing Director/Office of Native American Programs Administrator & Date:				
Director, June 30, 2002				X				

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFRHF)

**Part II: Supporting Pages**

PHAName:			Grant Type and Number OH12PO3150101 Capital Fund Program Grant No. 2001 Replacement Housing Factor Grant No. 2001			Federal FY of Grant: 2001		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-01 Community Estates	<b>Site Improvement</b>	<b>1450</b>						
	Replace Fiber in Sandbox	1450.14	250SF	5,000.00	5,000.00	1,976.00	1,976.00	
	Install Retaining Wall	1450.11	250LF	25,000.00	25,000.00	7,150.00	0.00	
	Install Security Fence	1450.11	300LF	10,000.00	17,000.00	2,500.00	0.00	
	Total for Site Improvement			40,000.00	47,000.00	11,626.00	1,976.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Install Security Screens in Kitchen	1460.19	28	12,000.00	0.00	0.00	0.00	Moved to 50102
	Install Security Screens in Bedroom	1460.19	29	12,000.00	0.00	0.00	0.00	Moved to 50102
	Replace Front Storm Doors	1460.21	29	12,000.00	12,000.00	0.00	0.00	
	Replace Medicine Cabinets	1460.12	19	3,500.00	3,500.00	3,500.00	304.00	
	Replace Front, Back & Shed Doors	1460.21	All		51,232.00	0.00	0.00	Moved up from 50102
	Total for Dwelling Structures			39,500.00	66,732.00	3,500.00	304.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	
Signature of Executive Director & Date:				Signature of Public Housing Director/Office of Native American Programs Administrator & Date:				
Director, June 30, 2002				X				



Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFRHF)  
**Part II: Supporting Pages**

PHAName:				Grant Type and Number OH12PO3150101 Capital Fund Program Grant No. 2001 Replacement Housing Factor Grant No. 2001		Federal FY of Grant: 2001		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-02 Scattered Sites 224W. Highland	<b>Site Improvement</b>	<b>1450</b>						
	Replace Main Sewer Line	1450.13	150 LF	16,500.00	0.00	0.00	0.00	Line item no longer needed
	Total for Site Improvement			16,500.00	0.00	0.00	0.00	
213S.Willow	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Kitchen	1460.11	All	12,000.00	12,000.00	0.00	0.00	
WEImSt.	Replace Roof	1460.18	2	35,000.00	35,000.00	8,800.00	8,800.00	
1339 Franklin	Replace Side Doors	1460.21	2	1,000.00	1,000.00	1,000.00	164.76	
	Total for Dwelling Structures			48,000.00	48,000.00	9,800.00	8,964.76	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	
Signature of Executive Director & Date:				Signature of Public Housing Director/Office of Native American Programs Administrator & Date:				
Director, June 30, 2002				X				

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFRHF)

**Part II: Supporting Pages**

PHAName:			Grant Type and Number OH12PO3150101 Capital Fund Program Grant No. 2001 Replacement Housing Factor Grant No. 2001			Federal FY of Grant: 2001		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-04 Eastowne Manor	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Unit Door Locks	1460.19	50	10,000.00	10,000.00	9,632.00	0.00	
	Replace Unit Doors & Peepholes	1460.21	50		79,068.00	15,793.00		
	Total for Dwelling Structures			10,000.00	89,068.00	25,425.00	0.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Non dwelling Structures</b>	<b>1470</b>						
	Total for Non dwelling Structures			0.00	0.00	0.00	0.00	
	<b>Non dwelling Equipment</b>	<b>1475</b>						
	Total for Non dwelling Equipment			0.00	0.00	0.00	0.00	
Signature of Executive Director & Date:				Signature of Public Housing Director / Office of Native American Programs Administrator & Date:				
<b>Director, June 30, 2002</b>				<b>X</b>				

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFRHF)

**Part II: Supporting Pages**

PHAN Name:			Grant Type and Number OH12PO3150101 Capital Fund Program Grant No. 2001 Replacement Housing Factor Grant No. 2001			Federal FY of Grant: 2001		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-05 Town Square	<b>Site Improvement</b>	<b>1450</b>						
	Additional Concrete Work/Pads	1450.14	10	16,500.00	0.00	0.00	0.00	Moved to 50102
	Total for Site Improvement			16,500.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Medicine Cabinets	1460.12	30	5,000.00	5,000.00	5,000.00	2,805.00	Moved to 50100
	Replace Windows	1460.14	210	83,800.00	0.00	0.00	0.00	
	Total for Dwelling Structures			88,800.00	5,000.00	5,000.00	2,805.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Non dwelling Structures</b>	<b>1470</b>						
	Total for Non dwelling Structures			0.00	0.00	0.00	0.00	
	<b>Non dwelling Equipment</b>	<b>1475</b>						
	Total for Non dwelling Equipment			0.00	0.00	0.00	0.00	
Signature of Executive Director & Date:				Signature of Public Housing Director/Office of Native American Programs Administrator & Date:				
Director, June 30, 2002				X				

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFRHF)

**Part II: Supporting Pages**

PHAName:			Grant Type and Number OH12PO3150101 Capital Fund Program Grant No. 2001 Replacement Housing Factor Grant No. 2001			Federal FY of Grant: 2001		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work(2)
				Original	Revised(1)	Funds Obligated(2)	Funds Expended(2)	
OH31-9 Heritage Knolls	<b>Sitel Improvement</b>	<b>1450</b>						
	Concrete Pads by Units	1450.14	7	5,000.00	5,000.00	0.00	12.87	
	Concrete Work-Sidewalks	1450.14	As Needed	10,000.00	26,500.00	0.00	0.00	
	Total for Site Improvement			15,000.00	31,500.00	0.00	12.87	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Convert Garage to Community Space	1460.21	75 SF	6,000.00	0.00	0.00	0.00	Moved to 50104
	Replace Downspouts & Gutters	1460.14	As Needed	10,000.00	10,000.00	0.00	0.00	
	Total for Dwelling Structures			16,000.00	10,000.00	0.00	0.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment-Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	
Signature of Executive Director & Date:				Signature of Public Housing Director/Office of Native American Programs Administrator & Date:				
Director, June 30, 2002				X				

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFRHF)  
**Part II: Supporting Pages**

PHAName:			Grant Type and Number OH12PO3150101 Capital Fund Program Grant No. 2001 Replacement Housing Factor Grant No. 2001			Federal FY of Grant: 2001		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-11 Washington Group Home	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Total for Dwelling Structures			0.00	0.00	0.00	0.00	
	<b>Dwelling Equipment-Nonexpendable</b>	<b>1465.1</b>						
	Replace Heating and A/C unit	1465.13	1	4,250.00	4,250.00	0.00	0.00	
	Total for Dwelling Equipment-Nonexp.			4,250.00	4,250.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
Total for Nondwelling Structures			0.00	0.00	0.00	0.00		
<b>Nondwelling Equipment</b>	<b>1475</b>							
Total for Nondwelling Equipment			0.00	0.00	0.00	0.00		
Signature of Executive Director & Date:				Signature of Public Housing Director/Office of Native American Programs Administrator & Date:				
Director, June 30, 2002				X				
Signature of Executive Director & Date:				Signature of Public Housing Director/Office of Native American Programs Administrator & Date:				
X				X				

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRF) Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
OH31-01 Athena Gardens	03/30/02			06/30/03			
OH31-01 Community Estates	03/30/02			06/30/03			
OH31-02 SWillow	06/30/02			09/30/03			
Franklin Ave.	06/30/02			09/30/03			
W. Elm St.	06/30/02			09/30/03			
OH31-04 Eastowne Manor	06/30/02			09/30/03			
OH31-05 Town Square Villas	06/30/02			09/30/03			
OH31-09 Heritage Knolls	09/30/02			06/30/03			
OH31-11 Washington Group Home	06/30/02			09/30/03			
HA-Wide Physical Improvements							
HA-Wide Mgmt. Impr.	12/30/03	12/31/02		09/30/03			
Administration	12/30/03	12/31/02		09/30/03			
Fees & Costs	12/30/03	12/31/02		09/30/03			
Contingency	12/30/03	12/31/02		09/30/03			

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**X** **Director, September 25, 2001**

**X**

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

(2) To be completed for the Performance and Evaluation Report.

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

OMBApprovalNo.2577-0157  
(exp.7/31/98)

Signature of Executive Director & Date:	Signature of Public Housing Director / Office of Native American Programs Administrator & Date:
<b>X</b>	<b>X</b>

Page2of3

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Annual Statement/Performance and Evaluation Report  
 Comprehensive Grant Program (CGP) **Part III: Implementation Schedule**

U.S. Department of Housing  
 and Urban Development  
 Office of Public and Indian Housing

OMB Approval No. 2577-0157  
 (exp. 7/31/98)

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	

Signature of Executive Director & Date:

**X**

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**X**

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

(2) To be completed for the Performance and Evaluation Report.



# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary

HAName:  <b>Portage Metropolitan Housing Authority</b>	Grant Type and Number: OH12PO50102 Capital Fund Program Grant No: 2002 Replacement Housing Factor Grant No: 2002 Federal FY of Grant: <b>2002</b>
--	--

<input type="checkbox"/> Original Annual Statement	<input type="checkbox"/> Reserve for Disasters/Emergencies	<input type="checkbox"/> Revised Annual Statement/Revision Number _____	
<input checked="" type="checkbox"/> Performance and Evaluation report for Program Year Ending Jun-02 _____	<input type="checkbox"/> Final Performance and Evaluation Report		

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds	0.00	0.00	0.00	0.00
2	1406 Operations	0.00	22,300.00	22,300.00	0.00
3	1408 Management Improvements	72,600.00	102,600.00	102,600.00	0.00
4	1410 Administration	51,200.00	51,200.00	51,200.00	0.00
5	1411 Audit	1,500.00	1,500.00	0.00	0.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	15,000.00	5,000.00	5,000.00	0.00
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	42,000.00	58,500.00	0.00	0.00
10	1460 Dwelling Structures	299,946.00	256,050.00	0.00	0.00
11	1465.1 Dwelling Equipment-Nonexpendable	0.00	45,754.00	0.00	0.00
12	1470 Nondwelling Structures	0.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	5,500.00	20,000.00	20,000.00	0.00
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	0.00	0.00	0.00	0.00
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1499 Development Activities	0.00	0.00	0.00	0.00
19	1501 Collateralization or Debt Service	0.00	0.00	0.00	0.00
20	1502 Contingency	24,261.00	5,500.00	5,500.00	0.00
21	<b>Amount of Annual Grant (Sum of Lines 2-20)</b>	<b>512,007.00</b>	<b>568,404.00</b>	<b>201,100.00</b>	<b>0.00</b>
22	Amount of line 21 Related to LBP Activities	0.00	0.00	0.00	0.00
23	Amount of line 21 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
24	Amount of line 21 Related to Security-Soft Costs	6,400.00	0.00	0.00	0.00
25	Amount of line 21 Related to Security-Hard Costs	0.00	0.00	0.00	0.00
26	Amount of line 21 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing factor (CFP/CFPRHF)**  
**Part II: Supporting Pages**

PHAName: PortageMetropolitanHousingAuthority		GrantTypeandNumber:OH12PO50102 CapitalFndProgramGrantNo:2002 ReplacementHousingFactorGrantNo:2002				FederalFYofGrant:2002		
Development Number/Name HA-Wide Activities	GeneralDescriptionofMajorWork Categories	Dev.Acct.No.  Number	Quantity	TotalEstimatedCost		TotalActualCost		StatusofProposedWork
				Original	Revised(1)	Funds Obligated(2)	Funds Expended(2)	
HA-Wide	Operations	1406		0.00	22,300.00	22,300.00	0.00	
HA-Wide	ManagementImprovements	1408						
	ResidentSecurity			6,400.00	6,400.00	6,400.00		
	DevelopJobTraining&Business							
	DevelopPrograms			28,700.00	58,700.00	58,700.00		
	CoordinatorofSocialServicesforDrug Elimination			37,500.00	37,500.00	37,500.00		
	TotalforManagementImprovements			72,600.00	102,600.00	102,600.00	0.00	
HA-Wide	Administration	1410						
	a.Salaries	1410.1		36,050.00	36,050.00	36,050.00		
	b.FringeBenefits	1410.9		14,050.00	14,050.00	14,050.00		
	c.Advertising	1410.19		1,100.00	1,100.00	1,100.00		
	TotalforAdministration			51,200.00	51,200.00	51,200.00	0.00	
HA-Wide	Fees&Costs	1430						
	a.Architect			15,000.00	5,000.00	5,000.00		
	TotalforFees&Costs			15,000.00	5,000.00	5,000.00	0.00	
HA-Wide	NondwellingStructures	1470						
	TotalforNondwellingStructures			0.00	0.00	0.00	0.00	
HA-Wide	NondwellingEquipment	1475						
	a.writer/officeEquipment			5,500.00	20,000.00	20,000.00		Movedto706 Movedto706
	TotalforNondwellingEquipment			5,500.00	20,000.00	20,000.00	0.00	
HA-Wide	RelocationCost	1495.1		0.00	0.00	0.00	0.00	
HA-Wide	Contingency	1502		24,261.00	5,500.00	5,500.00	0.00	
SignatureofExecutiveDirector&Date:				SignatureofPublicHousingDirector/OfficeofNativeAmericanprogramsAdministrator&Date:				
Director,September30,1999				X				

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part II: Supporting Pages**

PHAName: Portage Metropolitan Housing Authority			Grant Type and Number: OH12PO50102 Capital Fund Program Grant No: 2002 Replacement Housing Factor Grant No: 2002			Federal FY of Grant: 2002		
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised	Funds Obligated	Funds Expended	
OH31-05 Town Square Villas	Drainage Fences Replace Trees Landscaping Concrete Work Replace Patio Fences	1450	400 LF	10,000.00 6,000.00 2,000.00 4,000.00 16,500.00 20,000.00	10,000.00 6,000.00 2,000.00 4,000.00 16,500.00 20,000.00			
	Total for Site Improvement			42,000.00	58,500.00	0.00	0.00	
OH31-01 Athena Gardens	Replace Siding, Gutters, Downspouts and Shutters	1460	All	104,650.00	104,650.00			
OH31-01 Community Estates	Repl Siding, shutters, Gutters, Downspouts Doors	1460	all	151,400.00 43,896.00	151,400.00			
	Total for Dwelling Structures			299,946.00	256,050.00	0.00	0.00	
OH31-03 Ravenna Woods	Foundation and Drainage Work	1460	as needed		45,754.00			
				0.00	45,754.00	0.00	0.00	
				0.00	0.00	0.00	0.00	
				0.00	0.00	0.00	0.00	

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHG) Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
OH31-01 Athena Gardens	03/31/03			06/30/04			
OH31-01 Community Estates	03/31/03			06/30/04			
OH31-05 Town Square	09/30/03			06/30/04			
HA-Wide Physical Improvements							
HA-Wide Mgmt. Impr.	09/30/04			12/31/05			
Administration	09/30/04			12/31/05			
Fees & Costs	09/30/04			12/31/05			
Contingency	09/30/04			12/31/05			
Signature of Executive Director & Date:				Signature of Public Housing Director / Office of Native American Programs Administrator & Date:			

X

Director, September 24, 2002

X

**U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing**

Signature of Executive Director & Date:	Signature of Public Housing Director/Office of Native American Programs Administrator & Date:
<b>X</b>	<b>X</b>

OMBApprovalNo.2577-0157  
(exp.7/31/98)

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**X**

**AttachmentN****MTWRENTPOLICYCHANGEAND  
PROCEDURALCLARIFICATION****RentPolicyChange ñPublicHousing*****LateRentalPayments***

If due to financial hardship a tenant cannot pay the rental amount due, PMHA will allow the tenant to make a written agreement, based on the following guidelines. During the 14 Day Notice of late rent, the tenant must contact the Housing Manager to schedule a meeting. During the meeting the tenant and Housing Manager will execute a written agreement stating the tenant must pay the following month's rent on time (within five working days) and that if they do so, then they will be given until the end of that same month to pay the previous month's rent. Should the tenant fail to initiate contact and/or fail to execute a written agreement by the last day of the 14 Day Notice, the 3 Day Notice will be issued.

This opportunity for a rent payment extension will only be granted two times in any 12 month period per tenant. The twelve month period will begin upon the first time the tenant utilizes the payment extension.

**Clarification of Implementing Procedures ñPublicHousing*****Interim Change Effecting Utility Reimbursement***

Upon any income change PMHA will recalculate the household's TTP (Total Tenant Payment). The Tenant Rent (amount payable by the family based on the new TTP) will then be determined. If a higher TTP, upon recalculation, reflects the tenant would no longer receive a Utility Reimbursement, if any, the effective date of the Tenant Rent (amount payable by the household) will not change due to the need to provide a thirty day notice of rent increase, however, the household will no longer be income eligible for a Utility Reimbursement. The Utility Reimbursement will be zero during the period prior to the thirty day notice. The Tenant Rent (amount payable by the household) will also be zero. If the new TTP reflects the household is income eligible for a lower Utility Reimbursement, then the new Utility Reimbursement will be issued.

Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) **Part I: Summary**

U.S. Department of Housing  
and Urban Development

OMB Approval No. 2577-0157

(exp. 7/31/98)

Office of Public and Indian Housing

HA Name: <b>Portage Metropolitan Housing Authority</b>	Comprehensive Grant Number: <b>OH12PO31707</b>	FFY of Grant Approval: <b>1999</b>
---	---	---------------------------------------

<input type="checkbox"/> Original Annual Statement	<input type="checkbox"/> Reserve for Disasters/Emergencies	<input type="checkbox"/> Revised Annual statement/Revision Number _____
<input type="checkbox"/> Performance and Evaluation report for Program Year Ending _____	<input checked="" type="checkbox"/> Final Performance and Evaluation Report	

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGP Funds	0.00	0.00	0.00	0.00
2	1406 Operations (May not exceed 10% of line 19)	0.00	0.00	0.00	0.00
3	1408 Management Improvements	101,700.00	85,626.98	85,626.98	85,626.98
4	1410 Administration	61,574.20	50,914.94	50,914.94	50,914.94
5	1411 Audit	1,500.00	1,500.00	1,500.00	1,500.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	0.00	12,349.45	12,349.45	12,349.45
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	52,000.00	36,356.96	36,356.96	36,356.96
10	1460 Dwelling Structures	324,400.00	306,710.43	306,710.43	306,710.43
11	1465.1 Dwelling Equipment - Nonexpendable	1,200.00	1,200.00	1,200.00	1,200.00
12	1470 Nondwelling Structures	0.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	15,700.00	14,004.83	14,004.83	14,004.83
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	45,000.00	107,078.41	107,078.41	107,078.41
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1498 Mod used for Development	0.00	0.00	0.00	0.00
19	1502 Contingency (may not exceed 8% of line 20)	12,667.80	0.00	0.00	0.00
20	<b>Amount of Annual Grant (Sum of Lines 2-19)</b>	<b>615,742.00</b>	<b>615,742.00</b>	<b>615,742.00</b>	<b>615,742.00</b>
21	Amount of line 19 Related to LBP Activities	0.00	0.00	0.00	0.00
22	Amount of line 19 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
23	Amount of line 19 Related to Security	30,000.00	17,851.23	17,851.23	17,851.23
24	Amount of line 19 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

Signature of Executive Director & Date:

**X** Director, September 30, 2002

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**X**

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

(2) To be completed for the Performance and Evaluation Report.



Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

U.S. Department of Housing  
and Urban Development

OMB Approval No. 2577-0157  
(exp. 7/31/98)

Office of Public and Indian Housing

Development Number/Name	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
HA-Wide	<b>Operations</b>	<b>1406</b>		0.00	0.00	0.00	0.00	
HA-Wide	<b>Management Improvements</b>	<b>1408</b>						
	Resident Security			30,000.00	17,851.23	17,851.23	17,851.23	
	Develop Job Training & Business							
	Develop Programs			20,000.00	29,032.58	29,032.58	29,032.58	
	Coordinator of Social Services for Drug Elimination			33,700.00	33,955.68	33,955.68	33,955.68	
	Staff Training			8,000.00	331.70	331.70	331.70	
	GAAP Conversion and Software			10,000.00	3,833.79	3,833.79	3,833.79	
	Management Services				622.00	622.00	622.00	
	Total for Management Improvements			101,700.00	85,626.98	85,626.98	85,626.98	
HA-Wide	<b>Administration</b>	<b>1410</b>						
	a. Salaries	1410.1		44,788.00	35,971.53	35,971.53	35,971.53	
	b. Fringe Benefits	1410.9		15,466.20	14,032.02	14,032.02	14,032.02	
	c. Advertising	1410.19		1,320.00	911.39	911.39	911.39	
	Total for Administration			61,574.20	50,914.94	50,914.94	50,914.94	
HA-Wide	<b>Fees &amp; Costs</b>	<b>1430</b>						
	a. Architect				12,349.45	12,349.45	12,349.45	
	Total for Fees & Costs			0.00	12,349.45	12,349.45	12,349.45	
HA-Wide	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide	<b>Nondwelling Equipment</b>	<b>1475</b>						
	a. Typewriter/office Equipment			5,500.00	14,004.83	14,004.83	14,004.83	Moved to 706
	b. Dump Bed Liner for Pick Up Truck			3,500.00	0.00			Moved to 706
	c. Trailer			3,200.00	0.00			Moved to 706
	d. Key Machine			3,500.00	0.00			
	Total for Nondwelling Equipment			15,700.00	14,004.83	14,004.83	14,004.83	
HA-Wide	<b>Relocation Cost</b>	<b>1495.1</b>		0.00	0.00	0.00	0.00	
HA-Wide	<b>Contingency</b>	<b>1502</b>		12,667.80	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

**Director, September 30, 2002 X**

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

form **HUD-52837** (10/96)

(2) To be completed for the Performance and Evaluation Report.

ref Handbook 7485.3

Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0157  
(exp. 7/31/98)

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-02 Scattered Sites St. Rt. 183     3701 Duffield	<b>Site Improvement</b>	<b>1450</b>						
	Increase Parking & Driveway Include Excavation, Drainage & Retaining Wall	1450.11	4	20,000.00	7,560.00	7,560.00	7,560.00	
	Total for Site Improvement			20,000.00	7,560.00	7,560.00	7,560.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Gutters	1460.14			761.00	761.00	761.00	
	Insulation	1460.21			500.00	500.00	500.00	
	Electric Upgrade	1460.15			750.00	750.00	750.00	
	Rehab Kitchen	1460.11			10,279.43	10,279.43	10,279.43	
	Total for Dwelling Structures			0.00	12,290.43	12,290.43	12,290.43	
	<b>Dwelling Equipment - Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

**Director, September 30, 2002 X**

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form **HUD-52837** (10/96)

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Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0157  
(exp. 7/31/98)

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-03 Ravenna Woods	<b>Site Improvement</b>	<b>1450</b>						
	Trim Trees and Remove Tree Stumps	1450.11	As Needed	15,000.00	13,110.00	13,110.00	13,110.00	
	Total for Site Improvement			15,000.00	13,110.00	13,110.00	13,110.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Bath Tubs	1460.13	28	45,000.00	38,724.40	38,724.40	38,724.40	
	Total for Dwelling Structures			45,000.00	38,724.40	38,724.40	38,724.40	
	<b>Dwelling Equipment - Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

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Signature of Public Housing Director/Office of Native American programs Administrator & Date:

**Director, September 30, 2002 X**

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form **HUD-52837** (10/96)

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Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

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and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0157  
(exp. 7/31/98)

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-05 Town Square Villas	<b>Site Improvement</b>	<b>1450</b>						Moved to 706
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Bath Tubs	1460.13	30	48,000.00	35,529.80	35,529.80	35,529.80	
	Replace Closet Doors	1460.21	90	25,000.00	0.00	0.00	0.00	
	Total for Dwelling Structures			73,000.00	35,529.80	35,529.80	35,529.80	
	<b>Dwelling Equipment - Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

**Director, September 30, 2002 X**

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form **HUD-52837** (10/96)

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Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

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and Urban Development  
Office of Public and Indian Housing

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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-06 Etna House	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Shingle Roof	1460.18	7,000 SF	34,000.00	67,540.00	67,540.00	67,540.00	
	Replace Fire Escape	1460.14	1	35,000.00	26,756.00	26,756.00	26,756.00	
	Total for Dwelling Structures			69,000.00	94,296.00	94,296.00	94,296.00	
	<b>Dwelling Equipment - Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

**Director, September 30, 2002 X**

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form **HUD-52837** (10/96)

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Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

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and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0157  
(exp. 7/31/98)

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-09 Heritage Knolls	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Roofs	1460.18	9	70,000.00	41,700.00	41,700.00	41,700.00	
	Replace Storm Doors	1460.21	56	15,400.00	17,160.00	17,160.00	17,160.00	
	Replace Closet Doors	1460.21	150	25,000.00	0.00	0.00	0.00	
	Replace Bath Tubs	1460.13	30	0.00	34,654.80	34,654.80	34,654.80	Moved to 706 moved up from 708
	Total for Dwelling Structures			110,400.00	93,514.80	93,514.80	93,514.80	
	<b>Dwelling Equipment - Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

**Director, September 30, 2002 X**

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Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0157  
(exp. 7/31/98)

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-10 Ravenna Scattered	<b>Site Improvement</b>	<b>1450</b>						
	Install Sheds		10	17,000.00	12,166.96	12,166.96	12,166.96	
	Total for Site Improvement			17,000.00	12,166.96	12,166.96	12,166.96	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Replace Flooring (carpet bedrooms & Replace tile in Kitchen and Bathrooms	1460.13	9,000 SF	21,000.00	23,800.00	23,800.00	23,800.00	
	Replace Storm Doors	1460.21	20	6,000.00	2,600.00	2,600.00	2,600.00	
	Total for Dwelling Structures			27,000.00	26,400.00	26,400.00	26,400.00	
	<b>Dwelling Equipment - Nonexpendable</b>	<b>1465.1</b>						
	Replace Refrigerators, stoves, & Hoods	1465.11			1,200.00	1,200.00	1,200.00	
	Total for Dwelling Equipment - Nonexp.			0.00	1,200.00	1,200.00	1,200.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

**Director, September 30, 2002 X**

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form **HUD-52837** (10/96)

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Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0157  
(exp. 7/31/98)

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-11 Washington Group Home	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Total for Dwelling Structures			0.00	0.00	0.00	0.00	
	<b>Dwelling Equipment - Nonexpendable</b>	<b>1465.1</b>						
	Install Kitchen Appliances	1465.11	1 ea	1,200.00	0.00	0.00	0.00	Move to 706 to obligate savings
	Total for Dwelling Equipment - Nonexp.			1,200.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

**Director, September 30, 2002 X**

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Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

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Office of Public and Indian Housing

OMB Approval No. 2577-0157  
(exp. 7/31/98)

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-04 Eastowne Manor	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Terrace Repair	1460.18			0.00	0.00	0.00	Moved to 706 to obligate savings
	Total for Dwelling Structures			0.00	0.00	0.00	0.00	
	<b>Dwelling Equipment - Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

**Director, September 30, 2002 X**

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ref Handbook 7485.3

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Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

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Office of Public and Indian Housing

OMB Approval No. 2577-0157  
(exp. 7/31/98)

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-15 Acquisition Rehab	<b>Site Improvement</b>	<b>1450</b>						
	3138 Polly Rd. Concrete Drive				3,520.00	3,520.00	3,520.00	
	Total for Site Improvement			0.00	3,520.00	3,520.00	3,520.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	3138 Polly Rd. Window Replacement	1460.14			3,000.00	3,000.00	3,000.00	
	Replace Kit. Cabinets & Counter Tops	1460.11			1,940.00	1,940.00	1,940.00	
	Gutters	1460.14			1,015.00	1,015.00	1,015.00	
	Total for Dwelling Structures			0.00	5,955.00	5,955.00	5,955.00	
	<b>Dwelling Equipment - Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

**Director, September 30, 2002 X**

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Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

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Office of Public and Indian Housing

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(exp. 7/31/98)

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
Tenth Project	<b>Site Improvement</b>	<b>1450</b>						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	<b>Dwelling Structures</b>	<b>1460</b>						
	Total for Dwelling Structures			0.00	0.00	0.00	0.00	
	<b>Dwelling Equipment - Nonexpendable</b>	<b>1465.1</b>						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	<b>Nondwelling Structures</b>	<b>1470</b>						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	<b>Nondwelling Equipment</b>	<b>1475</b>						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

**Director, September 30, 2002 X**

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form **HUD-52837** (10/96)  
ref Handbook 7485.3

# Revised Implementation Schedule 707

## Annual Statement/Performance and Evaluation Report

### Comprehensive Grant Program (CGP) Part III: Implementation Schedule

U.S. Department of Housing

and Urban Development

Office of Public and Indian Housing

OMB Approval No. 2577-0157

(exp. 7/31/98)

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
OH31-02 Scattered Sites St.Rt.183 Duffield	03/31/00	12/31/00		06/30/01			
OH31-03 Ravenna Woods	06/30/00	06/30/01		09/30/01	12/31/01		Ongoing
OH31-04 Eastowne Manor		06/31/01			12/31/01		Ongoing
OH31-05 Town Square	09/30/00	06/31/01		09/30/01	12/31/01		Ongoing
OH31-06 Etna House	09/30/00	01/31/01		09/30/01			Completed
OH31-09 Heritage Knolls	9/30/200	06/30/01		09/30/01	12/31/01		Ongoing
OH31-10 Single Family	09/30/00	06/30/01		09/30/01	06/30/02		Jobs Training Program
OH31-11 Wash Group	03/31/00	06/31/01		06/30/01	12/31/01		Moved to 706 to Obligate Savings
OH31-15 Acq Rehab		09/30/01			12/30/01		Moved to 707 from 50100
HA-Wide Mgmt. Impr.	09/30/02	09/30/01		12/31/02	06/30/02		
Administration	09/30/02	09/30/01		12/31/02	06/30/02		
Fees & Costs	09/30/02	09/30/01		12/31/02	06/30/02		
Contingency	09/30/02	09/30/01		12/31/02	06/30/02		

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

**X**

Director, September 30, 2002

**X**

(2) To be completed for the Performance and Evaluation Report.

ref Handbook 7485.3

**U.S. Department of Housing  
and Urban Development**  
Office of Public and Indian Housing

Office of Public and Indian Housing

Signature of Executive Director & Date:	Signature of Public Housing Director/Office of Native American Programs Administrator & Date:
<b>X</b>	<b>X</b>

form **HUD-52837** (10/96)  
ref Handbook 7485.3

## Annual Statement/Performance and Evaluation Report Comprehensive Grant Program (CGP) **Part III: Implementation Schedule**

**U.S. Department of Housing  
and Urban Development**  
Office of Public and Indian Housing

OMB Approval No. 2577-0157  
(exp. 7/31/98)

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:	
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**X**

**X**

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

(2) To be completed for the Performance and Evaluation Report.

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form **HUD-52837** (10/96)  
ref Handbook 7485.3